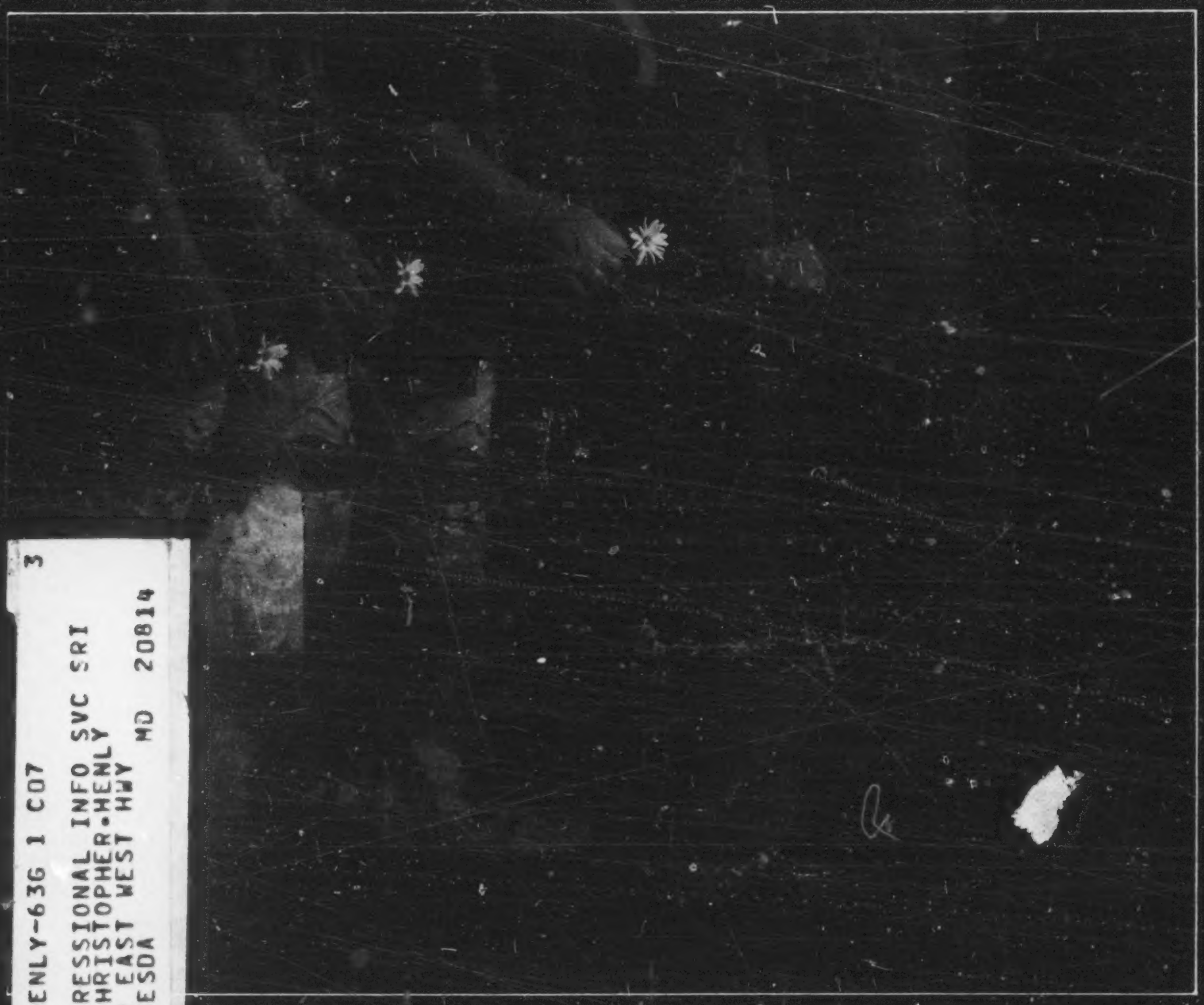
C5150-7 12/27/82

Chain Store Age

GENERAL MERCHANDISE EDITION DECEMBER 1982

THE NEW CONFORMISTS



72-HENLY-636 1 C07 3
CONGRESSIONAL INFO SVC SRI
MR CHRISTOPHER HENLY
4520 EAST WEST HWY
BETHESDA MD 20814

"BABY BOOMERS" FALL INTO STEP

2ND ANNUAL CONSUMER BUYING INTENTIONS STUDY

IN THIS ISSUE

cover photo by Eric Barick

Special issue news

Regular features of CSA, such as the Touche Ross Management Development Course, do not appear in this issue because of the special Consumer Buying Intentions Study. They will return next month.

Copies of the research data compiled for the CSA study of 9,000 households may be purchased. For more information, contact Murray Forseter, editor.

9 THE NEW CONFORMISTS ● Baby boomers fall into step ● Debunking the big spender myth ● Resilient crowd those boomers

21 THE MARKET ● Shoppers more certain in '83 ● Picking winners tricky business ● Sears, K mart set for better years ● Quality—selection keys after price ● Inciting shoppers to buy apparel ● Location important in buying intentions

33 HOME/OFFICE & STATIONERY ● Boomers buying half of all files ● Romance novels lure loyal core

35 SEWING/CRAFTS ● A "pattern" for saving ● Craft selection beckons customers

36 SPORTING GOODS ● Exercise gear rates with big earners ● Cyclists slower to spend

41 CONSUMER ELECTRONICS ● Big year ahead for home computers ● Skyrocketing sales for video games ● Video cartridge market exploding ● Telephone market splits in two ● Appeal expands for phone answerers ● On-the-go boomers want stereo to go ● Recession slows VCRs, for now ● TVs stay strong and healthy

57 DOMESTICS ● Table linens boost dept. stores

58 HARDWARE/HOME COMFORT ● Price is key to air cleaners ● Cold weather will warm heater volume ● Ceiling fans to whirl at Sears

60 LUGGAGE ● Brands count big

62 LAWN & GARDEN ● Chains zapped by bug killer concern ● Big 3 to bag more lawn mower volume ● Economy puts snag in barbecue grills

65 PHOTO/CAMERA ● 35mm, instants: partners in sales slump ● Quick film labs slow down instants

68 ELECTRIC HOUSEWARES ● Microwave ovens—quietly exciting ● Microwave bakeware draws older customer ● Popcorn poppers poop out

73 AUTOMOTIVE ● '83 bright for auto sound

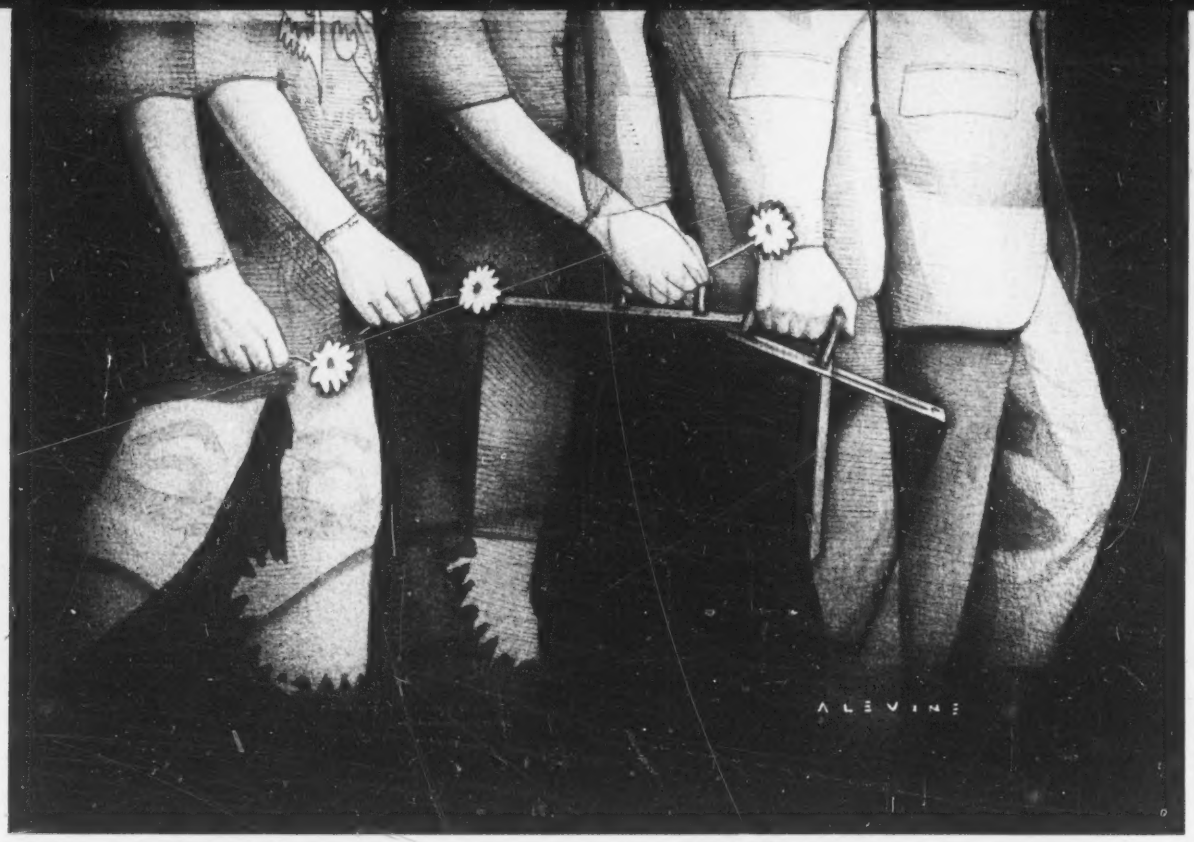
75 APPAREL MERCHANDISING ● Jeans on the upswing ● Blazers suit working women ● Little action in activewear ● "Sweat" dressing: fashion, not fad ● Price, assortments sell swimsuits ● Women cuddle up to teddies ● Price/value worth more than fashion ● Price keys sales of kids' sleepers ● Athletic shoes keep on truckin'

CHAIN STORE AGE General Merchandise Edition (ISSN 0193-1350) is published monthly by Lebhar-Friedman Inc., 425 Park Ave., New York, N.Y. 10022. Retailers: $9 a year; two years, $17; Canada, $10 a year; two years, $19. Wholesalers, manufacturers, schools, libraries and all others: $15 a year; Canada, $16 a year. Foreign subscriptions: Airmail only, $75 a year. Single copy rate $2. Second Class postage paid at New York, N.Y., and at additional mailing offices. Vol. 58, No. 12.

Copyright © 1982 by Lebhar-Friedman Inc. All rights reserved.

ALL CORRESPONDENCE should be addressed to Executive Offices, Chain Store Age General Merchandise Edition, 425 Park Ave., New York, N.Y. 10022. For a change of address, six weeks notice to Circulation Fulfillment Director, 99 Park Ave., New York, N.Y. 10016, is requested. Give old and new address and zip code. If possible enclose address portion from cover on previous issue. Postmaster: Please send address changes to Subscription Dept., General Merchandise Edition, 99 Park Ave., New York, N.Y. 10016. Member Audit Bureau of Circulations, Second Class Mail Publications Inc., and Magazine Publishers Association.

Copyright © 1982 by Lebhar-Friedman Inc.



The baby boomers fall into step

Figuring out the 'Pepsi Generation' is an iffy business at best

Margaret Hadlock concedes the recession hit home this year and was no longer "something you read about." With her $25,000 income, price should be a priority when the Seattle native selects a store. Hadlock's tastes, however, run toward "sedate" and expensive high-end department stores like I. Magnin for apparel and mom and pop stores for hard lines.

Kent and Susan Wedel have been hard hit by the economy. But even with their combined income of $74,000 last year, the Wedels didn't see any reason to shop keystone prices at department stores. Instead, Sears, Penney and even K mart snared the couple's apparel spending dollars.

Hadlock and the Wedels have two things in common. They're baby boomers, churned out during the great baby making stretch between 1946 and 1964 when one-third of the entire population hit the scene.

Secondly, these consumers and their boom generation peers are as predictably unpredictable as any other shopping group. And despite repeated attempts to pigeonhole the baby boomers, they remain an elusive lot.

Since they began flooding hospitals and schools in the 40's and 50's, baby boomers have been monitored more carefully than any generation in history. Retailers took notice in the 60's when the boomers flocked to suburban shopping malls—their allowances in one hand, shopping lists in the other.

"Because of its massive size and huge potential impact on everything in society, this generation has been under a microscope nearly since conception," says Alan Murray, vp in Citibank's economics department. "Every slight nuance in its habits has been treated as earth shattering."

But the social bloodhounds apparently lost track of the generation when the baby boomers reached maturity because misconceptions about the boomers are still abundant.

Robert Savage, pres. of Compton Advertising, claimed recently, "[The baby boomers] seek immediate gratification . . . They're fad-oriented . . . less committed to work." Other generation watchers charge the boomers have enormous disposable incomes that they part with happily to satisfy whims.

Merchandising strategies based on expected shopping habits such as these will be greeted by a *very unreceptive audience.* And without reaching these 76 million shoppers, no merchant can succeed in the 80's, cautions one top retail marketing exec.

What most observers now realize is that the generation raised on, "Dr. Spock, suburbs, sex, drugs, rock 'n' roll, movies and television," as Savage sees it, has fallen right into step with the rest of the population.

"What's happening now," explains Tom Murnane, director of shopping trends research for Management Horizons, "is that the behavior patterns of previous generations are showing up in this generation—the goals of having a home and children."

"The risk in looking at the baby boom generation and generalizing that it's highly different from previous generations is that most people only compare baby boomers to their parents," adds Richard Hokenson, economic demographer for Wall Street's Donaldson, Lufkin & Jenrette. "When you look back at earlier generations, it's really the parents that were different."

For example, Hokenson points out while 60% of all mothers of baby boomers married before the age of 20, only 40% of the baby boomers' grandparents wed in their teens.

Enormous disposable income: The label that has stuck to the baby boomers longest is that they have enormous disposable incomes and spend them recklessly—a logical tagline considering the size of the generation's paychecks. The boomers' combined income last year was $424 billion. As their median income ratchets upward to a projected $30,000 per year by 1990, the generation's aggregate earnings is expected to hit $1.2 trillion, nearly half the entire United States gross national product last year.

Beefed up by baby boomers hitting their peak earning years, estimates are that the number of households classified as upper income (earning $25,000 annually in 1977 dollars) will mushroom by 10.4 million in the 80's for a total of 25.6 million families. At the same time, the total family growth in the United States will expand only 9%.

The net result, demographers predict, will be the creation of a consuming elite. Prognosticators say that from 1970 to 1990, families earning $25,000 or less will see their incomes inch upward 1.8% while discretionary dollars remain flat. Families earning $25,000 or more will see their incomes soar 88.8% with discretionary dollars leaping 116%.

But the baby boomers also face severe fiscal pressures. The U.S. Agriculture Department projects that the price tag for raising a child born in '81 to age 18 is $134,000, or more than four years salary by 1990 standards.

Dr. Sandra Shaber of Chase Econometrics points out that the relative income of the baby boomers

Debunking the big spender myth

☐ The microscope that magnified the shopping habits of baby boomers throughout their years as swinging singles apparently lost focus as the generation matured and married. If there's one criticism leveled at the generation debunked by the *CSA*/Leo Shapiro research, it's that cold cash burns holes in their Levi's.

Baby boomers, in fact, appear more willing to tighten their belts. More than half the boomers polled by Shapiro report cutting back on their standard of living in recent months while only 46.6% of the rest of the population admits to lifestyle retreats.

The generation that observers claim demands instant gratification is also more willing to put off purchases. Overall, more than two-thirds will trim their spending sails and wait out economic squalls as compared to 55.7% of all nonbaby boomers.

Elliot Stone, pres./ceo of Jordan Marsh-Boston, agrees that boomers have developed a shopping discipline. When furnishing a home, Stone notes, most consumers buy what they can afford. Baby boomers buy what they want . . . but in stages.

"They have certain specifications in mind to suit their lifestyle and they'll select merchandise and pay the price," Stone says of the boomers. "They may not be able to buy as much, as often, but what they buy will represent quality . . . regardless of price."

The Shapiro research did discover that baby boomers tend to buy at the first store they visit—doing less comparison shopping between stores than the rest of the population. Critics may credit this to instant gratification, but Shapiro pres. George Rosenbaum counters there are simpler explanations.

First off, he says, boomers are "time poor." More than two-thirds of all baby boom couples fall into the two-income-household slot. More importantly, Rosenbaum adds, they're presold by advertising, etc., so they "know what they want."

Willing to wait for what they want

	Would delay buying if cut back spending	
	Baby boomers	Nonbaby boomers
Housewares	63.1%	58.7%
Lawn & garden	62.1	57.8
Hardware	56.3	53.3
Consumer electronics	74.3	61.8
Photo/camera	81.7	69.0
Sporting goods	67.8	64.3
Home/office	72.0	65.5
Health & beauty aids	21.1	10.1
Domestics	37.2	39.8
Other	66.2	56.6

Source: *CSA*/Leo Shapiro & Associates

"Fast laners or not, we're much more efficient shoppers," boasts Katherine Gray of Los Angeles. "We understand our goal price range—what quality and brand we can afford."

Generation watchers also charge that the baby boomers buy today at the expense of saving for tomorrow. Again, the statistics paint a different picture.

Diary Panels run by the Bureau of Labor Statistics to chart savings vs. spending patterns indicate young people tend to have small nest eggs. "But this was a fact of life in 1961, before the baby boomers reached maturity, and it was just as true in 1971," points out Richard Hokenson, economic demographer for Donaldson, Lufkin & Jenrette.

Is this newfound shopping discipline simply a knee-jerk reaction to the boomer's heightened concern over the economic malaise? Alan Murray, vp in Citibank's economics department, doesn't think so. "They did have a greater appetite for spending and they have come to expect more," Murray contends. "But once they're really out on their own they feel the pressure." ☐

Resilient crowd those boomers

☐ Baby boomers are a plucky lot indeed. First called when pink slips are circulating, boomers view the future the same way Broadway's Annie does—there will always be a tomorrow and it's going to be better than today.

According to the *CSA*/Leo Shapiro poll, 4 of every 10 baby boomers claim they're better off this year than last and more than half expect their family incomes to increase in the coming months. Only 22.4% of all nonbaby boomers feel more secure this year and barely a third anticipate better days ahead.

And by nearly a 2 to 1 margin, the boomers are more optimistic that their paychecks will fatten faster than inflation.

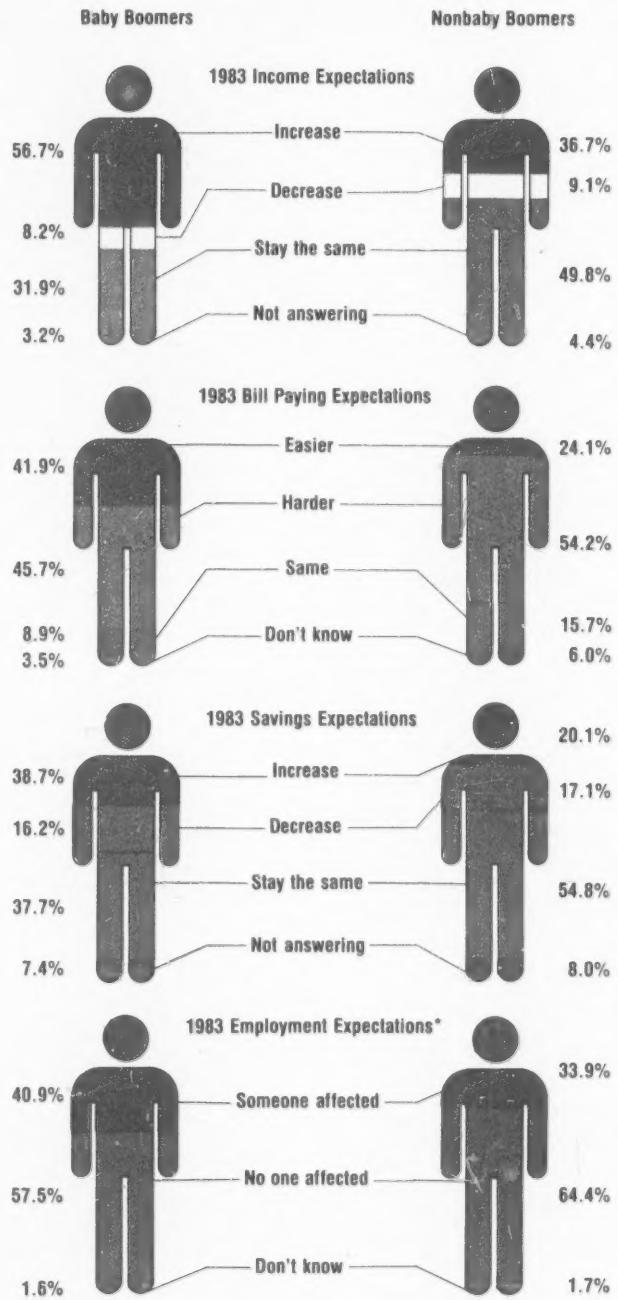
This rosy outlook comes in spite of the fact that the baby boomers concede they're more vulnerable to the vagaries of hard-times economics. More than a third of the boomers report employment problems for a family member in the past year and 41% expect employment difficulties next year.

Another signal that the generation realizes the economic gun is pointed its way comes from studies tracking consumers' perceptions of their households' discretionary income.

A Management Horizons survey found that all consumers *believe* they have $95 per month in discretionary income. Squeezed the most were households headed by 18- to 26 year olds, with 40% estimating they have less than $50 per month. Households headed by 27- to 35 year olds claimed to have the most play money, averaging $113 a month in discretionary income.

But even those better-than-average older baby boomers appear inclined to beef up their bank accounts. Some 45% reported they would save all or part of last July's tax cut while 62% of the younger boomers would put at least some aside. ☐

An 'Annie's'-eye view of what's ahead



**What are the chances of someone in your family being laid off, losing a job or having hours, commissions or overtime cut during the coming months?*

Source: *CSA*/Leo Shapiro & Associates

has been weakening. Comparing the earnings of consumers 25 to 34, the heart and upper limit of the boom generation, Shaber says baby boomers earned 98% of the median income of all families in '79, or slightly below average. Last year, the boomers earned only 96% of the median income of all families.

"These are not phenomenal differences," Shaber says, "but remember they occurred in a span of two years."

The recessions of '73-'74 and today have also dampened the baby boomers' one-time propensity for spending. Shaber notes that baby boomers are more vulnerable to economic downturns (see accompanying stories).

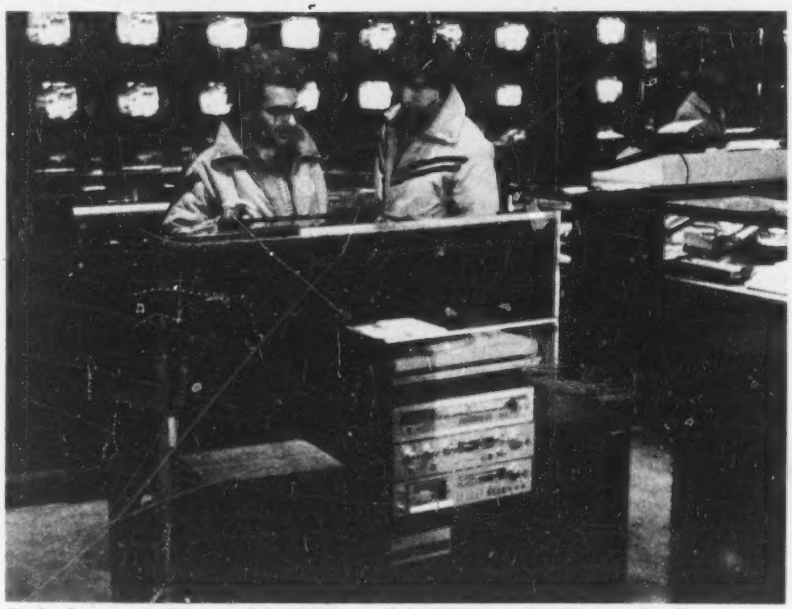
Studies also indicate that the baby boomers realize they're financially strapped. A Management Horizons poll found that the younger baby boomers, age 18-26, perceived they have less discretionary income than the population as a whole while the older boomers, age 27-35, believed they have the highest. But even the older crowd was inclined to save when asked what they'd do with July's tax cut dollars (see accompanying story).

The *CSA*/Leo Shapiro & Associates Consumer Buying Intentions Study also bucks the widely accepted opinion that baby boomers finance today's spending at the expense of saving for tomorrow. Baby boomers, in fact, are more willing to delay purchases when cutting back on spending as compared to nonbaby boomers. They also show a stronger tendency toward saving.

While comparable numbers of consumers polled by Shapiro—59.4% of the baby boomers and 59.3% of the nonboomers—say they haven't been able to save in recent months, 38.7% of the boomers expect savings to jump next year vs. 20.1% of the nonbaby boomers.

Economically pressed or not, baby boomers are still in the marketplace. Of the 37 hard lines products tracked for *CSA* by Shapiro, baby boomers equaled 43% of past year buys and 46% of the anticipated spending while representing only 36% of the households in the polling sample.

"They're still spending," sums up Woolworth's marketing vp Allan Pennington, "but they want a bigger bang for their bucks. They're much more value oriented and this can be price or service."



***Baby boomers:** the tuned-in children of the "Electronics Generation."*

Are discos different? Landon Jones, author of "Great Expectations: America and the Baby Boom Generation," claimed the boomers "created the fad and their shopping patterns will continue to erupt into one fad or another in the future."

Richard Hokenson agrees . . . to a point. He says the label is primarily a result of when it was given—early on in the generation's development before baby boomers faced the financial strains of being out on their own.

"The one characterization of singles is that they have time and monies to indulge themselves," Hokenson says. "But are discos really different from speakeasys?"

A good sign for retailers is the fact that singles do tend to spend more heavily and projections are that by the end of this decade, 50% of all family units will be singles. Hokenson adds, however, that the appeal of fads to baby boomers makes the generation even more unpredictable.

Retailers, he notes, who want to reach boomers must move into developing markets early in the power curve or the once loyal baby boom customer will shop the store that has the goods first.

While the baby boomers appear intent on disproving as many of the labels linked to them as possible, the one tag that best umbrellas these consumers is that they are, indeed, the "Electronics Generation."

Plugged in boomers tune in electronics

Clark Falkman once blew out his eardrums sitting too close to the speakers at a Jethro Tull concert. But the painful experience hasn't deterred the suburban New York resident's appreciation of hard, and loud, rock music. He's still adding to his $2,000-plus stereo system.

Falkman and the other baby boomers are all dancing to the same drummer. There's little doubt the generation is tuned into the sight and sound products available in consumer electronics departments. One survey conducted by Belden Associates for CASS Student Advertising noted that 90% of all college students with stereos paid more than $250 for their sound machines while 22% shelled out $900 or more and 13% handed over $1,500 or more.

Compared to the rest of the population polled in the *CSA*/Leo Shapiro & Associates study, baby boomers are more actively shopping home stereos, personal portable stereos, car sound systems, video game machines and VCRs. The boomers also express substantially

more interest in exercise equipment, barbecue grills, 35mm cameras, bicycles, men's cologne, K-D furniture and, not surprisingly, baby strollers.

The two electronics items that did not fare as well with the boomers were home computers and telephones. The generation also expresses less interest than nonbaby boomers in electronic bug killers, electric ceiling fans, air cleaners, sleeping bags and weed trimmers.

In soft lines, the Shapiro statistics point out the baby boomers are not the peacocks their costumes of the late 1960's would have indicated. Of the 11 apparel items tracked, boomers expressed more interest than nonbaby boomers in only six—jeans, athletic shoes, women's swimsuits, men's casual slacks, men's activewear and infants' sleepers.

Very interestingly, trendy sweat dressing appeals to baby boomers under the ages of 20 and 30 to 35. Surprisingly strong interest in this fashion line also appears among consumers between 35 and 44, a sign these shoppers are clinging to their youth.

Few market watchers will quibble with the *CSA*/Shapiro findings that baby boomers shop quality. Richard Hokenson of Donaldson, Lufkin & Jenrette believes the generation buys quality at the expense of volume.

"They tend to buy upscale and this is a result of their perception of value," he explains. "It's a function of buying Brooks Brothers suits or a suit at [private label-oriented] Bond's."

Mindie Zisser, a suburban Washington, D.C. consumer, notes, "I'd rather invest in classic looks which stay fashionable longer."

Hokenson credits this value equation for the squeeze on middle-of-the-road retailers with the schism at the Big 3 catalog chain level. "There are some consumers who shop discount stores because that's all they can afford," he says. "The pressure is on the middle where pricing structures are too high to reflect real savings, but not high enough—either price or perception-wise—to connote real quality."

Tom Murnane of Management Horizons argues that discounters upgrading their mix to bolster margins and layer on new customers may be trading themselves right into this chasm. Conceding that most market watchers disagree, Murnane warns price-edge competitors will move into the void opened when discounters trade up.

But nearly all market analysts applaud Penney's upgrading. "They may have claimed they didn't step up prices," says one retail watcher, "but they did. And it was the right thing to do. They repositioned themselves out of this squeeze on the middle market."

Penney, in fact, turned up as the only catalog chain baby boomers reported they were more likely to

Baby boomers are prime prospects

Products	-20	45-49
Home Computer	+	NM
Video Tape Recorder	NM	?
Video Game	?	?
Video Cartridge	?	?
Telephone	?	NM
Answering Machine	NM	?
Television	?	?
Home Stereo	?	?
Portable Stereo	?	NM
Car Stereo	?	?
Microwave Oven	?	?
Microwave Cookware	?	?
Food Processor	?	?
Coffeemaker	?	?
Popcorn Popper	?	?
35mm Camera	?	?
Instant Camera	?	?
Exercise Equipment	?	?
Sleeping Bag	?	?
Bicycle	?	?
Bug Killer	?	?
Portable Heater	?	?
Barbecue Grills	?	?
Power Lawn Mower	?	?
Ceiling Fan	?	?
Elec. Air Cleaner	?	?
Weed Trimmer	?	?
File Cabinet	?	?
Typewriter	?	?
Moisturizing Lotion	?	?
Men's Cologne	?	?
Sewing Patterns	?	?
Craft Kits	?	?
Table Linen	?	?
Knockdown Furniture	?	?
Baby Stroller	NM	?
Luggage	?	?
Jeans (all)	?	?
Jeans (women)	?	?
Jeans (men)	?	?
Athletic shoes (all)	?	?
Athletic shoes (women)	?	NM
Athletic shoes (men)	NM	?
Swimsuit (women)	?	?
Blazer (women)	?	?
Sweat Dress	?	?
Teddy	NM	?
Dress Shirt	?	?
Casual Slacks	?	?
Active Wear	?	?
Infants' Wear	NM	?

? Moderate buying intentions

NM = Not mentioned

Source: *CSA*/Leo J. Shapiro & Associates

shop than nonbaby boomers, according to the Shapiro data. And this figure stands out because the statistics indicate few differences between where boomers and nonboomers like to shop.

Contradictions in where boomers buy

Baby boomers or nonbaby boomers—it makes little difference when consumers select a store to shop for hard lines. And what differences turn up in the *CSA*/Leo Shapiro survey appear to be subtle contradictions.

Slightly fewer baby boomers head for discounters (14.7%) than the rest of the population (15.3%), for example, but more boomers shop K mart (6.2%) than nonboomers (4.1%). A few more boomers step up their price expectations and head for the Big 3 catalog chains but, in deference to their hard-pressed financial status, fewer boomers opt for department stores.

And contrary to popular thinking that baby boomers prefer specialists, slightly fewer of the generation (13.3%) shop the tight assortment stores than nonboomers (13.5%), with one exception. By nearly a 2-to-1 margin, the largest spread differentiating the boomers and nonboomers, the "tuned-in" generation shops specialists for their consumer electronics.

For soft lines, the shopping patterns of baby boomers and nonbaby boomers are only a tad more magnified. Fashion apparel—women's swimsuits, women's blazers, sweat dressing and teddies—is shopped at department stores first by all consumers.

Nonbaby boomers are nearly three times as likely to go to the Big 3 catalog chains, 14.8% vs. 5.7%, for fashion lines.

Men's apparel shapes up as price sensitive for the baby boomers although the generation appears unwilling to downgrade its perception of quality by shopping discounters. For while more than a fifth of the nonbaby boomers opt for full-line and apparel-oriented department stores for dress shirts, for example, boomers head for the Big 3.

What separates the shopping patterns of the baby boomers and nonbaby boomers most, perhaps, is the boom generation's tendency to buy at the first store they shop for hard lines *and* apparel. For example, when asked where they browse women's swimsuits, half of the baby boomers and 41.6% of the non-

Tuned in, tune out nonstore shopping

☐ About the only people snubbing the idea that nonstore video retailing and the baby boomers are a match made in their developing years are those boob tube bred boomers themselves. And they criticize the medium for not very practical reasons.

"Video shopping's an interesting concept," concedes Seattle's Margaret Hadlock, a devoted catalog customer, "but I'd be concerned about distortion in the color and fabric of the apparel."

Baby boomers, who flocked to suburban shopping malls as social centers in their teens, are now juggling careers, marriages and families. Only 3% polled by Louis Harris for *House & Garden* magazine last year would like more time for shopping. And yet, they appear less than enamored with the time-saving alternatives.

The Harris poll found that at-home buying is a priority among only 20% of the baby boomers while in-store shopping gets top billing from 77%.

A Management Horizons study points out that baby boomers may be an even *less* likely target for nonstore retailers. Asked about their shopping preferences, only 3% of the baby boomers mentioned nonstore retailing while 5% of the nonbaby boomers cited alternatives.

The *CSA*/Leo Shapiro survey shows little difference between baby boomers and the rest of the population regarding their attitudes toward at-home buying. Some 1.5% of the baby boomers would shop the 37 hard lines products tracked via the mail while 1.1% of the nonbaby boomers would.

Electronic video shopping as currently envisioned (ordering through a terminal with home delivery to follow) faces an even steeper hurdle than catalogs. With 72% of all childless baby boom couples and 66% of all baby boom couples with children being two-income households, the convenience of home delivery proves to be a less appealing carrot.

The prospects for electronic shopping really boil down to the question posed at October's Association of General Merchandise Chains Convention in Phoenix by Dr. William Davison, chairman of Management Horizons. "The issue is," he noted, "is it a shopping or purchasing medium?"

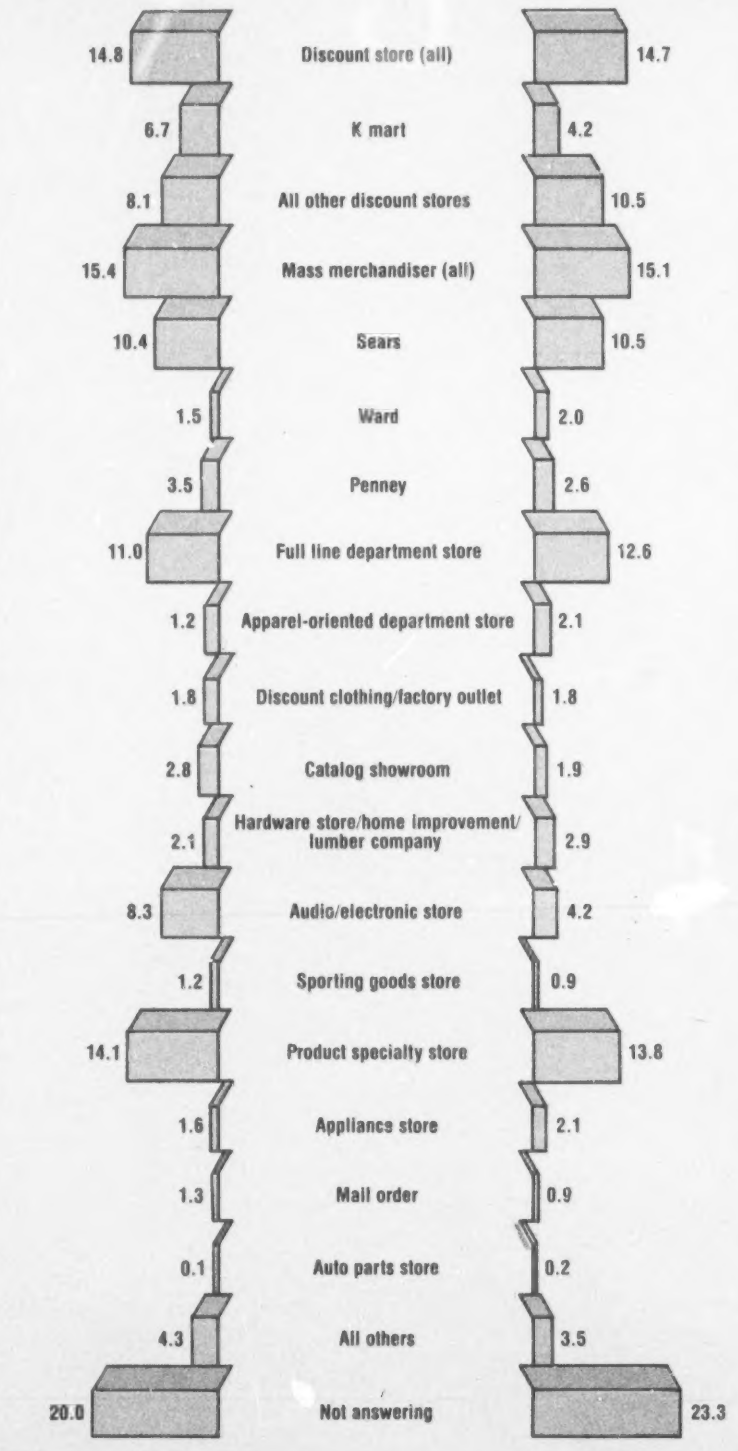
The differentiation is important, Davison contends, because many of video's capabilities—as a comparison shopping vehicle, for example—stop short of a buy.

And there's little doubt that baby boomers wade through product data before they even venture to the store. George Rosenbaum, pres. of Leo Shapiro & Associates, explains that this presold facet of the generation's shopping habits is a prime reason baby boomers tend to shop around less than the rest of the population—purchasing at the first store they shop.

So electronic marketing could have a bright future as an alternative source of information, much like many consumers currently utilize catalogs.

Barbara and Harold Sambol of Lakewood, N.J., for example, enjoy browsing through catalogs but only, they emphasize, for suggestions. "When you consider all of the hassles of returning items and getting your money back," Barbara says, "it's easier to go to a store, pick out the product and buy it. Pictures don't tell the whole story." ☐

Store selection differs, but just barely


Baby boomers (% citing store as place most likely to buy)*
*Totals more than 100% due to multiple responses
Nonbaby boomers (% citing store as place most likely to buy)*
14.8 Discount store (all) 14.7
6.7 K mart 4.2
8.1 All other discount stores 10.5
15.4 Mass merchandiser (all) 15.1
10.4 Sears 10.5
1.5 Ward 2.0
3.5 Penney 2.6
11.0 Full line department store 12.6
1.2 Apparel-oriented department store 2.1
1.8 Discount clothing/factory outlet 1.8
2.8 Catalog showroom 1.9
2.1 Hardware store/home improvement/ lumber company 2.9
8.3 Audio/electronic store 4.2
1.2 Sporting goods store 0.9
14.1 Product specialty store 13.8
1.6 Appliance store 2.1
1.3 Mail order 0.9
0.1 Auto parts store 0.2
4.3 All others 3.5
20.0 Not answering 23.3

Source: *CSA*/Leo Shapiro & Associates

boomers start looking at department stores. Asked where they're most likely to buy, the boomers stayed with the keystone pricers while the department stores' share of the nonbaby boomer market eroded to only 38.5%.

Why do consumers select the stores they shop? Price/discount ranks tops with baby boomers and nonbaby boomers, alike. Differences pop up in the second reasons.

For hard lines, boomers tend to be more quality oriented. They cite quality as a reason for store selection nearly twice as often as nonbaby boomers and the boomers are willing to pay more for quality.

Quality is also a prime concern for *all* consumers when they shop apparel. The time-pressed boomers, however, are more likely to select a store that is conveniently located or where they have a charge card. Nonbaby boomers are more store loyal, citing satisfaction with past purchases more often.

What's quite obvious is that baby boomers are not committed to the fashion-first department stores. In fact, the "time poor" boomers have become some of the loudest beefers criticizing the breadth of assortments offered by the keystone pricers and the all-to-often confusing environment boutiquing creates. It's interesting to note that when asked why they choose a particular store, selection turns up in second place (trailing price) only once—for men's apparel, which the baby boomers shop at the Big 3.

According to Kate Murphy of Space Inc., the store design consultants, retailers don't have to make stores easy to shop; they have to make the merchandise easy to buy. Since the shopping decision is often made outside the store, especially for the presold baby boomers, the key to boosting productivity is to layer on impulse sales.

The best way to achieve this end is through crossmerchandising. Too often, however, merchants coordinate outfits, but neglect to "coordinate" departments. Woolworth's Allan Pennington stresses the retailer must make sure the matching scarf, for example, is readily accessible for the customer who likes the way the item looks with the blouse she plans to buy. □

Shoppers more certain in '83

Stronger preferences shown for specific stores and brands

Troubled by the economy, consumers are reining in their spending. But when they do venture out with their shopping lists in hand, they are far more certain than last year as to which store they will visit and which brand they will buy.

A measure of the public's penchant for greater decisiveness in buying decisions comes from a comparison of 17 identical items studied in 1982 and 1981 for *Chain Store Age*'s Consumer Buying Intentions Study. For 15 of the items, more shoppers told *CSA*/Leo Shapiro & Assoc. researchers that they had specific stores in mind before going out to shop. For 13 items, more shoppers expressed specific brand loyalty.

Overall, in last year's study, 21 of 34 products evoked no store preference from at least 40% of those surveyed. This year, all 37 hard lines products passed the 40% mark. Moreover, 30 products racked up at least 70% store preference mentions.

Last year, 23 of 34 products failed to win a brand preference from at least 40% of the public. This year, a comparable 24 of 37 products fell into that predicament, an indication that the consumer is more interested in matching a store with a wide selection than in picking a brand and then searching out a store that carries it.

The most dramatic shifts in store and brand preferences showed up for microwave ovens, telephone answering machines and 35mm cameras. Each added at least 25% to its tally of last year for store preference. Microwave ovens added 25% in the brand preference column, while the other two achieved 18% additions.

Video game machines and instant developing cameras came in with greater store uncertainty figures. In the case of video game machines, though, the consumer appears to be highly brand conscious and willing to wait for a sale in any of the numerous outlets that carry them.

Instant developing cameras also had less customer loyalty than a year ago, but the changes are insignificant, a sign that Polaroid and Kodak have won widespread market identification.

These findings and more are part of *CSA*'s Second Consumer Buying Intentions Study. The study gauged the public's *readiness to buy, not sales projections* for some 50 hard lines and soft lines products. A national projectable sample of 2,717 households, supplemented by interviews with another 6,200 households in 45 metropolitan areas provided answers in the following areas: demographic profile of shoppers by product, share of market by store for purchases made in '82 and contemplated for '83, reasons for shopping a store, expectations of price to be paid, how active shoppers have been in following through on their purchase plans, brand preference and how sensitive buying plans are to economic dislocation.

More store/brand preferences

No Store Preference*		Item	No Brand Preference*	
'82 %	'81 %		'82 %	'81 %
33.5	38.2	Home computer	31.9	45.1
37.6	57.7	Video tape recorder	39.6	54.4
30.5	18.6	Video game machine	22.9	29.5
20.0	N.S.	Video game cartridge	17.7	N.S.
20.4	40.9	Telephone	42.0	38.8
32.9	58.3	Phone answering machine	44.1	62.9
32.4	N.S.	TV	26.3	N.S.
18.4	N.S.	Home stereo equipment	26.2	N.S.
15.4	N.S.	Personal portable stereo	27.0	N.S.
17.0	N.S.	Car stereo equipment	25.2	N.S.
29.2	56.0	Microwave oven	33.0	58.6
18.7	N.S.	Microwave cookware	30.0	N.S.
22.0	29.7	Food processor	31.3	25.8
13.4	N.S.	Electric coffeemaker	25.9	N.S.
17.7	N.S.	Popcorn popper	36.7	N.S.
23.0	49.0	35mm camera	21.9	39.7
28.9	26.1	Instant developing camera	29.3	25.1
21.3	46.2	Home exercise equipment	60.9	56.7
15.0	N.S.	Sleeping bag	43.3	N.S.
15.9	31.3	Bicycle	34.9	36.2
22.7	42.9	Electronic bug killer	54.8	58.3
26.3	43.2	Portable heater	40.3	49.9
31.9	45.8	Barbecue grill	46.0	56.9
22.4	N.S.	Power lawn mower	34.6	N.S.
31.8	49.5	Electric ceiling fan	51.2	59.2
18.4	N.S.	Electric air cleaner	29.8	N.S.
17.8	N.S.	Electric grass or weed trimmer	34.1	N.S.
25.3	40.2	Steel file cabinet	51.4	55.0
23.5	N.S.	Typewriter	27.5	N.S.
29.2	N.S.	Moisturizing lotion	38.3	N.S.
25.6	N.S.	Cologne (men's)	29.0	N.S.
14.0	N.S.	Sewing patterns	18.7	N.S.
12.5	N.S.	Craft kits	50.1	N.S.
16.4	N.S.	Table linens	57.1	N.S.
25.7	N.S.	K-D furniture	56.8	N.S.
14.3	N.S.	Baby stroller	45.6	N.S.
24.3	49.9	Luggage	37.6	51.1

**% consumers without preference*
N.S. Not Studied
Source: *CSA*/Leo J. Shapiro & Associates

Picking winners tricky business

Forecasting is tricky: the experience of a year ago bears that out. Of the 17 similar items tracked, *CSA* came within 20% of predicting sales. Those items included microwave ovens (5% projected vs. 5.5% actual) electronic bug killers (2% vs. 2.3%), home computers (1.4% vs. 1.2%), telephone answering machines (1.6% vs. 1.5%) and 35mm cameras (5.1% vs. 6%). In all, a respectable 0.294 batting average.

Outside, unforeseen factors affected other products. A harsh, cold winter aided heater sales (1.5% vs. 7.4% actual) while telephone deregulation accelerated sales (2.3%

High Economic Vulnerability

All Households Past Purchases '82/ Might Buy '83	Instant Camera		Knockdown Furniture		Microwave Oven		Video Game Machine		Personal Portable Stereo		35mm Camera		Car Stereo Equipment		Home Computer	
	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83
	6.3%	2.0%	2.4%	1.4%	5.5%	4.1%	6.7%	5.3%	4.2%	2.0%	6.8%	3.1%	6.8%	3.2%	1.2%	2.2%
K mart	15.6	13.4	10.3	10.0	0.9	1.0	9.8	10.5	4.8	0.0	3.8	8.0	2.9	3.7	11.0	3.5
Other Discounters	24.6	21.0	19.6	16.1	6.3	7.7	18.7	21.8	19.6	12.7	19.5	11.1	8.1	1.7	8.9	1.6
Sears	3.1	11.5	7.5	14.7	23.5	24.5	15.4	14.3	3.7	2.8	1.9	2.6	3.3	2.5	4.1	4.4
Ward	1.3	0.0	2.8	3.8	10.4	6.3	1.2	1.4	2.1	0.0	0.0	2.4	1.0	0.5	1.4	0.0
Penney	2.2	0.0	4.7	0.0	4.1	4.5	6.5	2.6	3.7	6.2	2.5	0.0	1.4	1.1	3.4	1.2
Dept. Store	16.1	11.5	16.8	16.5	12.7	19.0	17.1	16.3	20.6	9.7	13.2	16.3	5.2	2.1	7.5	5.4
Catalog Showroom	4.5	1.5	0.9	0.7	1.4	0.6	8.1	5.2	6.9	6.2	5.7	3.5	3.3	4.1	5.5	3.8
Specialty Store	13.4	25.3	19.6	22.3	29.9	24.5	13.8	22.4	26.5	46.0	44.0	34.9	59.1	70.5	47.2	73.1
All Others	19.2	15.8	17.8	15.9	10.8	11.9	9.4	5.5	12.1	16.4	9.4	21.2	15.7	13.8	11.0	7.0

Source: CSA/Leo J. Shapiro & Associates

vs. 6.6%). Continued strong product growth stimulated ceiling fan (3.9% vs. 6.2%) and exercise equipment (2.6% vs. 6.1%) sales.

For '83, the winners appear to be home computers, video game machines, telephones, space heaters and steel file cabinets. Each of these products registered higher interest in '82 *might buy* mentions than in '81. More importantly, the percentage of *active shoppers*, defined as those who have gone beyond the "wish" stage and have actually begun the shopping experience, came out higher in '82 for all five products.

Microwave ovens and telephone answering machines also garnered a higher percentage of active shoppers than a year ago, while ceiling fans had more people expressing an interest in them than in '81.

As a guideline, products with buying interest for '83 of at least half of the actual '82 purchase incidence represented viable growth areas. Only home computers and video tape recorders exceeded past purchases with buyer expectations. Fifteen others, ranging from sleeping bags to home stereo equipment, could be classified as real opportunities.

Sears, K mart set for better '83

The general pattern of store market shares for actual purchases showed little change year to year. Catalog showrooms improved for 12 of 16 identical products tracked in '82 and '81. Montgomery Ward came through with a surprising nine superior mentions, a level equaled by Other Discounters. K mart tied with Sears at eight improvements. Department stores had but seven higher marks in '82.

Sears and K mart should enter 1983 with opportunities to increase their market shares. When comparing past purchases to store buying intentions, the data show Sears ahead for 24 of 37 products with two ties. K mart came out ahead 23 times. Other Discounters had 15 pluses, department stores 14, catalog showrooms 12 and Ward 11.

Some of the specific changes from '82-'81 merit attention. Microwave ovens and exercise equipment are

Purchase patterns

The three-tiered charts on these pages depict purchase incidence/intentions and store market shares for 1982 and 1983. For example, 6.3% of the households polled bought an instant camera in '82. Without any advance motivation, such as promotions or sales, 2% of the survey sample said they would buy an instant camera in '83.

The charts also show the comparative product vulnerability to economic distress. Products are listed in descending order of vulnerability, reading left to right.

All Households Past Purchases '82/ Might Buy '83	Video Game Cartridge		Phone Answering Machine	
	'82	'83	'82	'83
	9.1%	3.9%	1.5%	1.3%
K mart	4.3	11.5	0.9	0.0
Other Discounters	18.8	18.2	4.3	10.3
Sears	14.0	13.0	2.6	11.1
Ward	0.0	0.0	1.7	2.6
Penney	4.8	1.2	0.9	0.0
Dept. Store	18.3	23.5	5.1	8.0
Catalog Showroom	4.8	8.3	9.4	1.6
Specialty Store	29.0	19.4	66.7	57.5
All Others	6.0	4.9	8.4	8.7

Source: CSA/Leo J. Shapiro & Associates

Low Economic Vulnerability

All Households Past Purchases '82/ Might Buy '83	Barbecue Grill		Electric Air Cleaner		Sleeping Bag		Popcorn Popper		Table Linens	
	'82	'83	'82	'83	'82	'83	'82	'83	'82	
	9.9%	4.1%	2.8%	1.5%	5.1%	2.8%	6.6%	1.4%	10.3%	5.7%
K mart	10.9	11.2	6.8	6.3	3.4	20.1	9.8	13.1	4.6	
Other Discounters	22.8	24.8	29.9	24.0	15.3	16.3	27.8	28.8	12.2	1
Sears	14.1	14.7	13.6	10.1	21.3	19.7	6.7	7.8	4.1	1
Ward	2.2	1.4	0.6	6.8	7.7	2.5	2.3	0.7	0.0	
Penney	1.6	0.0	0.6	0.0	10.2	3.7	4.6	2.4	3.6	1
Dept. Store	14.7	18.7	13.0	24.3	8.9	11.8	24.7	17.1	59.7	4
Catalog Showroom	2.7	3.9	7.4	0.9	6.4	0.7	8.5	13.9	0.0	
Specialty Store	7.1	4.9	3.7	11.5	17.8	15.9	2.3	0.0	8.7	
All Others	23.9	20.4	24.7	16.1	9.0	5.3	13.3	16.2	7.1	

Source: CSA/Leo J. Shapiro & Associates

High Economic Vulnerability

Home Exercise Equipment		Video Tape Recorder		Television		Bicycle		Home Stereo Equipment		Typewriter		Telephone		All Households Past Purchases '82/ Might Buy '83
'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	
6.1%	1.6%	1.7%	2.5%	9.8%	3.7%	10.3%	4.2%	7.4%	4.1%	4.4%	1.7%	6.6%	2.5%	
5.2	7.4	1.9	2.8	5.1	8.6	3.7	11.4	1.2	0.8	2.8	1.4	1.3	0.9	K mart
17.7	12.7	9.8	5.1	9.7	9.5	11.1	11.9	12.6	9.1	18.1	8.7	3.5	6.2	Other Discounters
15.6	13.0	7.9	12.9	13.0	13.0	10.2	13.6	9.0	2.2	11.6	16.3	0.3	0.3	Sears
7.3	10.5	4.2	1.4	1.4	0.0	3.3	2.6	1.2	0.0	0.6	3.2	0.6	2.3	Ward
4.7	4.3	3.3	0.5	0.9	2.0	1.6	2.4	4.8	3.8	1.9	4.3	0.0	0.0	Penney
13.5	14.1	9.8	8.6	17.6	20.2	9.6	7.3	9.6	4.6	11.6	9.5	1.3	5.0	Dept. Store
3.1	2.3	4.2	5.6	0.9	0.9	2.5	3.3	3.0	3.6	10.3	3.7	2.6	1.4	Catalog Showroom
18.7	23.3	39.1	43.9	41.3	40.7	37.3	35.9	43.1	58.6	24.5	34.6	83.7	74.0	Specialty Store
14.2	12.4	19.8	19.4	10.1	6.0	21.7	11.4	15.5	16.9	20.8	18.1	6.5	9.9	All Others

Base: All who named a store

targeted by Sears for dominance. The $18 billion retailer backed up the promise in microwaves (23.5% in '82 vs. 16% in '81), but fell short in exercise (15.6% vs. 21.5%). Ward cashed in on its appliance heritage with an impressive improvement in microwaves (10.4% vs. 7.2%).

Ward also won kudos for its video tape recorder performance (4.2% vs. 0.3%), while K mart nosedived (1.7% vs. 7.4%).

Electronic bug killers showed their approaching market maturity with distribution that zipped into Other Discounters (15.7% vs. 1.1%) and catalog showrooms (7.8% vs. 0.0%). After knocking off the bugs, shoppers found time to buy more barbecue grills in Other Discounters (22.8% vs. 15.3%) and Sears (14.1% vs. 10.6%), but not in K mart (10.9% vs. 24.3%).

K mart, however, more than dou-

Moderate Economic Vulnerability

Luggage		Food Processor		Steel File Cabinet		Microwave Bakeware & Accessories		Electric Ceiling Fan		Power Lawn Mower		Electronic Bug Killer		Electric Grass or Weed Trimmer		All Households Past Purchases '82/ Might Buy '83
'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	
8.2%	2.4%	5.6%	1.6%	2.8%	2.1%	6.3%	4.0%	6.2%	4.6%	6.2%	2.7%	2.3%	1.5%	5.8%	2.2%	
5.5	7.1	6.4	8.1	9.9	22.2	5.5	2.0	5.9	6.3	4.5	3.1	3.9	5.8	10.9	2.0	K mart
16.1	15.8	19.7	20.6	17.6	10.5	21.1	17.2	13.4	9.3	15.5	4.7	15.7	11.2	17.4	19.7	Other Discounters
9.5	15.2	11.6	17.0	18.3	21.7	18.0	25.3	16.0	28.3	24.2	35.9	23.5	28.0	15.8	16.6	Sears
1.8	3.2	5.8	0.0	3.8	0.3	5.5	0.0	6.7	2.7	8.3	12.7	2.0	0.0	1.9	1.8	Ward
8.8	10.4	4.0	0.8	1.5	2.4	1.6	3.2	3.4	4.1	1.5	2.1	2.0	1.3	2.3	0.8	Penney
31.0	26.1	23.7	19.4	8.4	5.4	16.4	20.4	3.4	2.5	6.0	0.5	3.9	8.4	8.3	11.8	Dept. Store
6.9	6.0	11.6	9.6	3.1	3.8	3.9	3.7	1.7	5.0	1.5	1.4	7.8	1.9	4.5	3.8	Catalog Showroom
9.1	9.6	2.3	5.0	26.7	20.3	5.5	8.9	24.4	12.6	23.4	23.5	18.6	25.7	26.4	22.2	Specialty Store
11.3	5.0	14.9	19.5	10.7	13.4	22.5	19.3	25.1	29.2	15.1	16.1	22.6	16.7	12.5	11.3	All Others

Base: All who named a store

Low Economic Vulnerability

Craft Kits		Baby Stroller		Portable Heater		Electric Coffeemaker		Moisturizing Lotion		Men's Cologne		Sewing Patterns		All Households Past Purchases '82/ Might Buy '83
'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	'82	'83	
15.6%	5.3%	3.5%	0.5%	7.4%	1.6%	9.7%	1.5%	33.4%	19.0%	30.5%	14.4%	15.3%	8.5%	
4.3	10.4	4.4	15.4	7.0	12.9	12.0	14.6	5.3	1.4	5.3	4.3	2.4	4.9	K mart
17.7	12.0	12.3	23.2	15.4	6.7	32.6	29.4	21.1	19.7	14.9	19.4	13.3	16.1	Other Discounters
0.6	0.0	12.3	5.4	15.1	21.0	6.0	8.8	0.0	1.3	1.1	0.0	1.2	4.6	Sears
1.8	0.0	1.8	7.6	1.7	1.6	2.1	1.5	0.0	0.0	1.1	0.0	0.0	0.0	Ward
1.8	0.0	6.1	9.6	1.3	2.7	1.8	2.5	0.0	0.0	0.5	0.0	4.8	2.0	Penney
12.2	12.8	21.1	12.8	11.7	6.8	20.4	13.8	18.2	14.4	39.9	30.6	10.8	8.0	Dept. Store
1.2	1.9	7.0	5.4	4.3	6.9	7.2	4.6	14.4	14.7	10.6	8.4	0.6	0.0	Catalog Showroom
48.8	54.7	28.1	2.4	7.4	7.5	5.1	10.7	2.4	3.6	0.5	2.5	63.9	62.2	Specialty Store
11.6	8.2	6.9	18.2	36.1	31.9	12.8	14.1	38.6	44.9	26.1	34.8	3.0	2.2	All Others

Quality—satisfaction lag at discounters for hard lines

Reasons for shopping hard lines	Discount store	K mart	Other discounters	Big 3	Sears	Ward	Penney	Dept. store	Specialty store	Mail order	Factory outlet
Price	67.8%	62.4%	67.8%	21.0%	20.5%	23.8%	21.8%	37.8%	19.9%	30.7%	48.9%
Selection	6.6	7.4	6.2	6.7	6.7	3.2	9.9	15.4	19.4	6.8	4.9
Quality	3.8	3.3	4.1	17.9	19.8	10.4	15.7	8.2	11.2	12.3	5.3
Satisfaction	3.4	4.0	3.1	16.2	17.1	13.7	13.4	10.2	10.6	1.9	5.4
Location/ convenience	12.7	16.4	10.7	13.0	12.1	17.7	13.2	16.7	13.8	14.8	5.7
Credit access	0.2	—	0.3	9.6	7.6	14.3	16.0	3.8	0.6	0.8	—
Service/repair/ guarantee	1.0	1.1	0.9	6.5	6.5	11.2	1.9	2.8	5.2	2.7	—
Other	2.2	1.3	2.6	4.6	5.3	0.7	6.3	1.6	12.8	0.8	16.9
Not answering	4.2	4.1	4.3	4.5	4.6	4.9	2.6	4.3	6.6	6.2	12.9

Source: *CSA*/Leo Shapiro & Associates

bled its shares for telephones (1.3% vs. 0.6%) and ceiling fans (5.9% vs. 2.2%), and more than tripled it for food processors (6.4% vs. 1.9%). Meanwhile, department stores went down in fans (3.4% vs. 8.4%) and food processors (23.7% vs. 29.9%).

Department stores also suffered a loss in heaters (11.7% vs. 29.7%), while Sears generated a 50% jump (15.1% vs. 10%).

Instant cameras proved a boon to Other Discounters (24.6% vs. 17.1%) and department stores (16.1% vs. 11.7%), and a bane to Sears (3.1% vs. 8.3%) and Ward (1.3% vs. 3.1%).

Ward always has taken a strong stand in home/office stationery products and in '82 it paid off. Ward won six times more allegiance for steel file cabinets (3.8% vs. 0.6%) at the same time that catalog showrooms came out of obscurity (3.1% vs. 0.0%).

Quality and selection keys

K mart may call itself the "savings place," but consumers told *CSA*/Shapiro that prices are better at other discount stores. When asked for the No. 1 reason they shop hard lines at particular stores, consumers rated price 67.8% of the time for Other Discounters and just 62.4% for K mart.

In addition, K mart's competitors outpaced it in quality perception, 4.1% to 3.3%. However, the nation's most numerous discounter outscored other low-margin operators by more than 50% when it came to location/convenient, and had a comfortable edge in selection and satisfaction.

By far, consumers said price rated as the No. 1 reason they shopped discount stores for hard lines and even more so for apparel (see apparel chart p. 30).

The choice for other outlets was not as simple. Access to credit always has been a major sales tool of the Big 3. Sears often boasts of its 36 million credit card holders. But it ranked third behind J. C. Penney and Montgomery Ward in hard lines ratings. Ward's strong 14.3% mark underscores the problem faced by the Chicago-based merchant. Interest on customer receivables has crippled Ward's return on sales. It is interesting to note that credit access is the third most mentioned reason for shopping Ward.

Also noteworthy, Penney's credit access rated a second place mention. Hard lines house Sears scored much higher in price, quality, satisfaction and location/convenient than in credit access.

Quality and selection provide an example of point/counterpoint. In hard lines, the Big 3 attained higher marks for quality than did department stores, which, in turn, had a higher selection ranking.

For apparel, department stores scored higher for their quality than for selection. And consumers rated their quality just marginally greater than that of the Big 3 when saying why they chose a store. In fact, quality at clothing department stores came out poorer.

Inciting shoppers to buy apparel

The majority of consumers are in no hurry to buy apparel. In fact, most have cut back on clothing purchases this year as a result of the harsh economic climate.

This is just one of the conclusions drawn from the Consumer Buying Intentions Study conducted for *CSA* by Leo Shapiro & Associates.

Despite the fact that retailers have been more promotional in 1982 than in previous years, shoppers have put off buying apparel. Most cannot cite one item they would buy to take advantage of current prices.

As they see it, prices for all goods have increased in the past few months, inhibiting them from purchasing not only apparel but also major items. Indeed no one interviewed by Shapiro pollsters claimed it was a good time to make large purchases such as washing machines or cars. The prevailing attitude was one of wait and see.

Compounding the harsh apparel outlook is the fact that the overwhelming majority of shoppers are finding it more and more difficult to pay their bills. There does not seem to be enough money to cover household expenses, even though over 50% of the consumers say their incomes have increased over a year ago. What's more, consumers are not confident about it becoming any easier to foot their expenses. Again, a wide majority claim it's going to be more difficult to make

Consumers split over price/quality for apparel

Reasons for shopping soft lines	All discounters	K mart	Other disc.	Big 3	Sears	Ward	Penney	Full-line dept.	Cloth. dept. store*	Spec. stores	Off-pricer	Sporting goods store	Other
Price/discount	75.9	70.4	78.3	39.4	17.1	19.6	7.8	13.8	23.2	29.4	62.9	9.7	7.8
Selection	5.4	4.2	7.0	14.4	15.9	13.3	12.5	21.9	20.6	29.4	3.8	37.8	22.2
Quality	7.9	2.8	6.6	28.9	37.6	32.9	37.5	37.9	31.4	19.6	13.6	16.9	—
Satisfaction/service reputation	5.8	6.3	6.1	13.6	15.2	13.3	11.3	11.5	10.6	11.7	8.3	8.9	11.1
Convenient location	6.2	8.5	3.5	9.0	6.1	14.7	11.3	10.7	7.5	8.2	2.5	7.8	11.1
Husband/family works there	—	—	—	0.4	0.4	1.3	—	0.8	0.6	—	—	1.1	—
Credit access	0.4	—	0.9	1.7	1.4	5.3	0.6	4.3	1.2	—	5.0	—	11.1
Other/not answering	4.4	4.3	3.3	4.6	5.8	4.1	2.4	5.7	12.6	11.3	4.1	8.8	22.3

*Apparel-oriented department stores
Source: CSA/Leo Shapiro & Associates

Buying intentions strongest in Pacific/Mountain States

Product	New England	Mid-Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Home computer	—	?	—	?	—	—	+	?	+
Video tape recorder	—	?	+*	+	?	—	—*	+	?
Video game machine	—	?	—	+*	?	?	+	—*	+
Video game cartridge	—	+	?	+	?	—	—	—	—
Telephone	—	?	—	+	+	—	—*	?	+
Phone answering machine	—	+*	—	—	—	—	+	+	+
Television	—	+	—	?	?	?	—	—	+
Home stereo equip.	—	?	?	+	—	—	—	+	+
Personal portable stereo	+	+	—	—	—	—	—	+	+
Car stereo equip.	—	?	—	+	?	—	+	?	+
Microwave oven	—*	?	—	?	—	+*	+	+	+
Microwave cookware	—	—	—	+	+	+	+	+	+
Food processor	?	—	?	?	?	—	+	—*	?
Electric coffee-maker	+	+*	—	?	?	?	?	?	+
Popcorn popper	—	?	—	—	—	?	+	+	+
35mm camera	—	+	—	+	—	—	+	+	+
Instant develop-ing camera	—*	?	—	?	—*	—	+	+	?

?Moderate buying intentions

*Reversal from 1981 (either + to — or — to +)

New England: Me., N.H., Mass., Conn., R.I., Vt. *Mid-Atlantic:* N.Y., N.J., Pa. *East North Central:* Ohio, Wis., Mich., Ill., Ind. *West North Central:* Minn., Iowa, Mo., Kan., Neb., S.D., N.D. *South Atlantic:* Del., D.C., Va., W. Va., N.C., S.C., Ga., Fla. *East South Central:* Ky., Tenn., Ala., Miss., *West South Central:* Ark., La., Okla., Tex. *Mountain:* Mont., Idaho, Wyo., Colo., N.M., Ariz., Utah, Nev. *Pacific:* Wash., Ore., Calif., Alaska, Hawaii.

Source: *CSA*/Leo J. Shapiro & Associates

ends meet in the coming year, despite the fact that nearly 43% maintain their incomes will increase in 1983.

In light of this view, many apparel shoppers do not think the general economic picture will brighten next year. Almost 40% allowed that it would get worse, while 1 in 5 thought conditions would stay about the same.

Not surprisingly, women felt more unsure about the economy than men. And shoppers with families were even more dubious about the economy picking up.

Most consumers interviewed by Shapiro have not had their family or themselves hurt by layoffs. More than 70% have remained untouched by job loss. Next year, however, 37% see themselves or someone in their family being laid off or losing commissions or overtime.

Nonetheless, a glimmer of hope does exist in the Shapiro data. Almost half of the consumers are confident their financial worth will improve in 1983. About 38% said their financial position remained the same in 1982 as in 1981, with the remainder evenly divided between those who said it had worsened and those who said it had become better.

Projecting ahead to next year, nearly 43% claimed their financial position would be even better than in 1982. Only 18% saw their situation deteriorating, while the rest thought they would be in the same shape.

Reaching consumers: To reach these apparel consumers who can look toward the future with some

optimism but who, in fact, face day-to-day hardships, retailers are going to have to offer priced-right goods. Obviously. But most consumers interviewed by Shapiro said they shopped department stores where quality to them was more important than price. It received top billing. As a result, retailers are going to have to walk a tightrope offering the best-priced merchandise at the best quality they can.

To do this, they must stock brands, be they store or name brands. While consumers interviewed by Shapiro may not be able to list brands for apparel items such as blazers or teddies, in stores they show a marked preference for this type of merchandise. Witness the proliferation of off-price stores. Many industry observers call these stores the "discounters" of the 80's. They marry price with quality.

Location important in buying

Having the right merchandise at the right price is only two-thirds of the retail equation. Having it at the right place—where the customer is—completes the transaction.

The charts measuring buying intentions by region provide a gauge of how easy it will be for retailers to find customers predisposed to buying each product. Measurements were rated against a norm; for those falling within the norm, a question mark signifies buyer ambivalence. Those favorably inclined to purchase an item are represented by plus signs. Items that evoked responses below the norm received a minus sign.

Thus, for home computers there are more than an average number of prospective customers in the Pacific and West South Central States. Fewer prospects are ready to buy in the East South Central, South Atlantic, East North Central and New England States. An average number can be found in the mid-Atlantic and West North Central States.

This is not to suggest that retailers will not be able to successfully move computers in volume in the average and below average states, or that those in above average states will just have to open their doors to close sales.

Rather, it means that retailers may have to coordinate their selling strategies to meet the different environments around the country. Informational promotions might be an acceptable tactic in California, whereas Massachusetts merchants might have to run price promotions.

Overall, the buying climate is strongest in the Pacific, Mountain and West North Central States, poorest in the New England, East North Central, South Atlantic and East South Central States.

Four changes occurred from last year: New England went from average to poor; mid-Atlantic from poor to average; West South Central from good to average and Mountain from average to good.

Product-wise, major shifts occurred in video games, instant cameras, bicycles and bug killers.

What's ahead

In the pages that follow, *CSA* takes a closer look at the products studied, department by department. □

Buying intentions strongest in Pacific/Mountain States

Product	New England	Mid-Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Home exercise equip.	—	?	?	+	—	—	+	?	+[1]
Sleeping bag	—	+	?	?	?	—	—	+	+
Bicycle	—[1]	?	?	+	+	—[1]	—	+	?
Electronic bug killer	—	—	—	—[1]	+[1]	—	+	—[1]	+[1]
Portable heater	—	+	—	—	?	?	—	—	—[1]
Barbecue grill	—[1]	+	—	+	—	?	+	+	?
Power lawn mower	—	—	?	—	+	—	+	+	?
Electric ceiling fan	—	—	—	—[1]	+	+	+	+	—
Electric air cleaner	—	?	?	?	—	—	?	+	+
Electric grass & weed trimmer	—	—	—	+	—	+	—	?	+
Steel file cabinet	—[1]	—	—	+	?	—	—[1]	+	+
Typewriter	—	?	?	+	?	—	?	?	+
Moisturizing lotion	—	?	—	—	—	+	—	+	+
Cologne (Men's)	—	+	—	?	+	+	?	?	—
Sewing patterns	?	—	—	?	—	?	—	+	+
Craft kits	—	—	—	?	?	?	—	+	+
Table linens	—	?	—	+	—	?	—	+	+
K-D furniture	+	+	—	?	?	—	?	?	+
Baby stroller	—	—	—	+	+	+	?	—	?
Luggage	—	+	—	+	—	?	+	—	+

?Moderate buying intentions

[1]Reversal from 1981 (either + to — or — to +)

New England: Me., N.H., Mass., Conn., R.I., Vt. *Mid-Atlantic:* N.Y., N.J., Pa. *East North Central:* Ohio, Wis., Mich., Ill., Ind. *West North Central:* Minn., Iowa, Mo., Kan., Neb., S.D., N.D. *South Atlantic:* Del., D.C., Va., W. Va., N.C., S.C., Ga., Fla. *East South Central:* Ky., Tenn., Ala., Miss., *West South Central:* Ark., La., Okla., Tex. *Mountain:* Mont., Idaho, Wyo., Colo., N.M., Ariz., Utah, Nev. *Pacific:* Wash., Ore., Calif., Alaska, Hawaii.

Source: *CSA*/Leo J. Shapiro & Associates

Bright color, decorative-look file cabinets attract baby boomers.

Boomers buying half of all files

The paperwork boom has caught up with the baby boom. The profusion of record-keeping requirements is forcing young households into the file cabinet market with a vengeance.

Although only 35.8% of respondents in this year's *CSA*/Leo Shapiro survey are under 35 years of age, they account for half of all recent purchasers and potential buyers of steel file cabinets.

Retailers say these young consumers are particularly susceptible to file cabinets in bright colors which complement their upbeat home decoration. This emphasis on the decorative aspect of file cabinets is backed up by the higher price expectation among potential purchasers. The median price quoted by those planning to buy a file cabinet in 1983 is $80, up from $73 this year.

Sears (21.7%) and K mart (22.2%) were most often mentioned as the likely place to shop for cabinets. Office products stores placed third with a 20.3% mention.

K mart last year had a mere 3.1% of mentions. It picked up share from other discounters and undecideds. But its actual purchase market share remained stable, 9.9% in '82 vs. 10% last year. □

File cabinets appeal to baby boomers and the more mature

Age	% of polling base	% who purchased or might buy	% difference
Under 20	2.0	1.5	−25.0
20-24	10.2	11.6	+13.7
25-29	12.6	24.3	+92.9
30-34	11.0	13.4	+21.8
35-39	10.6	9.7	− 8.5
40-44	8.0	10.6	+32.5
45-49	7.8	10.7	+37.2
50-54	6.7	9.5	+41.8
55-59	7.0	3.2	−54.3
60 and over	24.1	5.5	−77.2

Source: *CSA*/Leo Shapiro & Associates

Romance novels lure loyal core

Romance novels may have limited appeal, but readers are free-spending and loyal when it comes to the entertainment form.

Only 19% of the population in this year's *CSA*/Leo Shapiro Consumer Buying Intentions Study say they might buy a romance paperback in the coming year. But these readers expect to purchase an average of more than 21 books each in 1983, and 20.4% of purchasers say they bought more than 30 paperbacks this year.

These sales potential figures are even more impressive when taken in the context that most purchasers are cutting back on their standard of living and say they expect their financial situation to be only slightly better in 1983 compared to this year. While 48.7% of all respondents say they have cut back on their spending this year, 55.3% of prospective romance novel buyers have cut back.

Romance readers buy far more books than others

Total paperbacks purchased in 1982

Number	Bought romance novels	Will not buy
1-2	6.1%	23.9%
3-4	8.2	17.2
5-9	20.4	17.8
10-19	26.5	21.5
20-29	16.3	12.3
30-39	8.2	1.2
40-49	2.0	1.8
50+	10.2	4.3
Mean number	23.5 books	13.6 books

Source: *CSA*/Leo Shapiro & Associates

Most purchasers of romance novels are women (89.2%) with average educational backgrounds (85% are high school graduates and 39.4% have had some college), yet they fall into lower social categories when it comes to both family income and occupation of the chief wage earner.

While romance novel purchasers outpace the national average of those with family incomes between $20,000 and $30,000 by nearly 25%, one-third more potential romance readers say their family income is below $15,000 compared to the national average.

Book stores rated highest as the outlet shopped for the books, but 2 in 5 romance paperbacks are purchased at supermarkets (23.8%) and discount or dept. stores. □

Specialty stores rated highest among shoppers in the market for patterns.

A 'pattern' for saving money

Retailers stocking sewing patterns don't have to worry about their customers postponing pattern purchases. In fact, nearly 6 out of 10 (59%) of the shoppers who said they might buy patterns in the next year also reported that they actively shopped the lines within the last couple of months.

The *CSA*/Leo Shapiro & Associates study shows sewing patterns have a very low economic vulnerability rating; only 2 out of 10 people said they would delay making a purchase if they cut spending in the future. However, for consumers in the market for patterns, convenience/location (28.7%) and selection (16.6%) scored high on their list of reasons to shop a store.

Specialty stores, mentioned by 62.2% of the shoppers, were named most often as the store consumers are most likely to buy patterns next year followed by discount stores with a 21% share of the future market.

The popularity of the sewing pattern category spans a wide range of ages, incomes and occupations, suggesting that consumers view sewing—whether for themselves, their families or their homes—as a good way of cutting expenses. The study shows interest in sewing patterns is surprisingly strong at higher-income levels rather than in low-income households.

Of the consumers who reported they had either purchased a pattern in the last year or expected to make a purchase in the next 12 months, 59.1% were from households with incomes topping $20,000 per year. Just 35% of all households who had bought or were planning to buy a pattern reported incomes of $20,000 or below.

The consumer most likely to buy sewing patterns is between the ages of 35 and 39, with two children present in the household.

Regardless of their incomes, there is a definite price range that is acceptable to these consumers. More than two thirds of the respondents, 71.5%, said they expect to pay no more than $3 for a pattern. Some 45.7% said they would pay $2 and 21.9% named $3 as the price they would expect to pay for their investment. □

All income groups sew to save

Annual family income	Bought in past year/ might buy in coming year
Under $5,000	1.1%
$5,000-$10,000	5.0
$10,000-$15,000	8.2
$15,000-$20,000	19.6
$20,000-$30,000	31.8
$30,000-$40,000	9.9
Over $40,000	13.9
Not answering	10.5

Source: *CSA*/Leo Shapiro & Associates

Craft selection beckons shoppers

The key to capturing the craft kit customer isn't the number of advertised brands, nor the amount of specialized classes retailers feature nor even a low-ticket price. Retailers trying to dazzle these creative folks are going to have to do it with selection.

The *CSA*/Leo Shapiro & Associates study shows that of all the consumers who might buy a craft kit within the next year, nearly 3 out of 10 named selection as a major consideration when selecting the store they will shop. Only 15.6% mentioned price. Almost half, 48.8%, shopped a product specialty store for their crafts needs last year and 54.7% said a specialist would be most likely to get their crafts business next year.

Just over 4 in 10 crafts customers said they would not delay making a purchase if they cut spending in the future. If and when they do buy craft kits, most respondents named $6 to $7 as the price they expect to pay (15%) followed by $10 to $12 (13.4%) and $15 to $16 (10.8%). □

'Crafty' merchants stock assortments

Reasons to shop a store	Might buy in coming year
Selection	29.5%
Location/convenient	17.4
Price/discount	15.6
Satisfaction/past experience	3.8
Specialty	3.3
Quality	3.2
Husband/family works there	0.8
Not answering	26.4

Source: *CSA*/Leo Shapiro & Associates

Exercise gear feels the pinch

The boom in exercise equipment sales might be reaching the saturation point and signs are the market may level off within the next 12 months. The *CSA*/Leo Shapiro & Associates study indicates there is a marked decline in buying intention when comparing consumers who last year said they would buy (2.6%) to those intending to buy during the next year (1.6%). Sixteen per cent fewer consumers placed in the active shopping market.

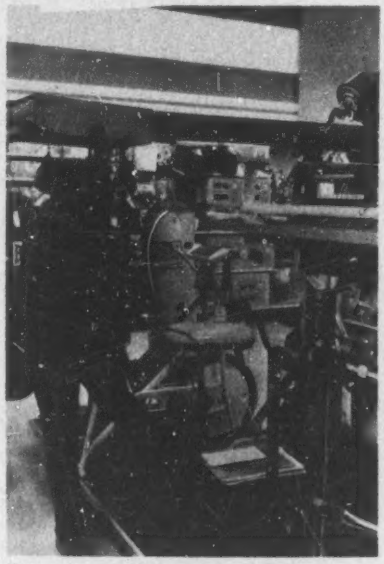
The difference in the number of consumers in the market for equipment suggests that the economic pinch is creeping up, impacting on consumers who earn $20,000 to $30,000 a year.

This becomes clearer when looking at the consumer most likely to be in the market for exercise equipment. Almost half, 42.2%, of the respondents are white-collar workers (professionals, managers and technicians). More than one-third, 40.2%, earn over $30,000 and 29.4% are college graduates.

Exercise equipment has become the recreational toy of the upper-income group. These high earners spend most of their time behind a desk and need a regular, accessible form of exercise.

It seems that looking fit and healthy rates highest with both those entering the work force and those who feel most vulnerable to the arrival on the job scene of the "young turks." Consumers between the ages of 20-24 and 40-44 were the likeliest target for equipment sales. The second most receptive target were shoppers between the ages of 25-29 followed by consumers 30-34.

Big earners or not, exercise equipment enthusiasts are conscious of costs. Over one quarter, 27.8%, named price as the No. 1 factor in selecting a particular store. Almost one third, 31.2%, expect to spend between $51 and $124 for their equipment. The Big 3 catalog chains were the stores mentioned most often as the place to shop exercise equipment in the coming year, holding the top ranking they snared this year among past purchasers. □



***Exercise equipment is** shaping up as the recreational toy of high earners.*

Exercise equipment appeals to high incomers

Annual family income	Bought in past year/might buy in coming year
Under $5,000	1.2%
$5,000-$10,000	4.6
$10,000-$15,000	9.5
$15,000-$20,000	14.9
$20,000-$30,000	21.3
$30,000-$40,000	20.5
Over $40,000	19.7
Not answering	8.3

Source: *CSA*/Leo Shapiro & Associates

Cyclists slower to spend this year

Bike shoppers have a pessimistic outlook concerning the United States economy. Seventy per cent say this is not a good time to make a major purchase, 61.6% say they have already cut back on their clothing purchases and 72% say they would delay buying a bike if they curtail spending within the next 12 months.

It is not surprising, therefore, when comparing consumer readiness to buy last year vs. this year, the *CSA*/Leo Shapiro & Associates study shows a considerable decline in consumer interest. In 1981, 7.8% of the consumers polled said they might buy a bike in the coming year. This year, only 4.2% said they might buy in the next 12 months. Oddly enough, this downsized potential market appears even more intent on buying a bike than the shoppers were last year. In 1981, 32.9% of the might buy customers said they were actively shopping the market and this year, 38.1% reported they are actively shopping bikes.

Despite the high degree of awareness and activity there has been little change in what motivates shoppers to buy—price is still the main factor. About one-third of potential bike customers named price as why they would shop a store.

Specialty and discount stores were the preferred place to shop, but more consumers are seeking alternatives. Eight per cent said they would buy next year through private parties, garage sales or flea markets. Last year no one forecast they would do so. But in fact, 14.8% of those who last bought bikes did so in a nonstore environment.

Almost half of those polled say $51 to $124 is the price they expect to pay.

Like last year, brand indifference dominates. About one-fifth, 20.2%, of all consumers say they might buy private label with less than one-half, 44.8%, reporting they might buy an advertised brand.

It seems that the likely bike customer splits into two distinct camps. Of all who bought/might buy, 17.4% are 20 to 24 year olds. This group is probably using their bikes as a mode of transportation or a regular method of exercise. The second group is the 30 to 34 year olds, who represent 20.6% of the bought/might buy market. These bikers may be using bikes as a relatively low-ticket recreational activity with their families.

This becomes clearer when reviewing the statistics comparing the number of children present in the household. The two top scorers for bought/might buy were households with no children, at 31.9%, and families with two children present, at 27.5%. □

Steep price drop has triggered spectacular sales gains for home computers.

Computers tabbed for big gains

The steep drop in prices for home computers is prompting spectacular sales gains for the microchip marvels. Unit sales next year should come close to the three million mark, a 150% increase over 1982.

Industry insiders say the personal computer is a product whose time has come. But consumers are still hesitant about committing themselves to the purchase. Only 2.2% of those surveyed in this year's *CSA/Leo Shapiro* study say they are considering buying a computer for home use. While this is an exceptionally strong 57.1% increase over those who answered the same question in 1981, it leaves demand for computers in the bottom third of all consumer electronics products.

Consumers who are shopping for a computer, though, are serious in their efforts. Personal computers ranked third, after microwave ovens and telephone answering devices, as the hard lines product drawing the most active shoppers. Six out of 10 of those who might buy a computer in 1983 are already visiting stores and discussing the product.

General merchandise retailers say it still takes "about four visits to the store" before a consumer makes his purchase. "A computer is still a product that needs a lot of explanation," says a northern California department store buyer.

But this year's introduction of the Timex/Sinclair-1000 computer for $99.99 may change that. According to industry insiders, the low price point and the fact that it's being marketed under the Timex label will bring many more people who are willing to take a chance into the marketplace. This willingness to purchase a computer without extensive in-store education is reflected by the 3.8% of potential buyers who say they will shop at catalog showrooms.

While nearly 20% more customers say they will shop a specialist for a computer next year compared to those who purchased one there in 1982, one-third of all potential computer buyers have no idea of where they will go. GM chains were cited by 1 in 5 shoppers as the place they would most likely buy a computer. Aggressive chain merchandisers may be able to build their market share by keying in on the one-third of the consumers who are as yet undecided where they will shop computers.

Another factor suggesting improved GM market penetration is that more than half of those who might buy a computer in 1983 say they are more than willing to seriously consider a store brand computer.

While interest in computers among baby boomers matches their numbers in relation to the population, nearly twice as many respondents under 20 years of age say they bought or might buy a computer compared to their segment of the general survey population.

The largest group of potential computer purchasers is between 35 and 49 years old. This group makes up one-quarter of the survey population, but should account for more than half of all computer purchases in 1982 and 1983.

According to the study, the bulk of the potential computer purchasers are affluent, with incomes above $30,000, and are college graduates with families of four or more children. But while most are optimistic that their own income and financial security will improve in 1983, they are no more optimistic

Computer shoppers are affluent and hopeful

Indicator	% of pop.	% of buyers	% diff.
Income:			
$20,000-$29,999	24.5%	25.1%	+ 2.4
$30,000-$39,999	11.2	16.9	+ 50.9
$40,000 & over	9.3	25.7	+176.3
Income increase in 1983 faster than inflation rate	6.8	23.7	+248.5
U.S. economy better in 1983	38.1	44.8	+ 17.6
Consumer goods prices to drop in 1983	9.8	18.2	+ 85.7

Source: CSA/Leo Shapiro & Associates

about the outlook for the national economy. Of all survey respondents, 38.1% say the economy will get better next year. Among computer purchasers, 44.8% say the economic picture will improve. Last year, nearly half of all computer purchasers said the economy would improve, compared to 47.9% of the general public. □

Skyrocketing sales for video games

By the end of 1983, one-quarter of all American households will be plugged into video game machines. Retailers and manufacturers are looking forward to sales of at least six million units next year, about 20% ahead of 1982 figures.

While this growth rate is lower than that posted for the past two years, electronics merchandisers say there is no real slowdown in sight. "The cartridge games are probably the single strongest category in the consumer electronics department today," notes the dmm for a Los Angeles-based store. He predicts that there will be a video game in half the homes in the country by 1985.

The optimism expressed by GMers is reflected in this year's *CSA*/Leo Shapiro & Associates study. More than twice as many survey respondents say they are planning on buying a video game in 1983 than said they would buy one in the 1981 study. Even more encouraging is the fact that 6.7% of respondents said they purchased a video game machine in 1982, a whopping 157.7% increase over those who said they would consider buying a unit this year. "It's really an impulse buy," notes a buyer for a Sunbelt discounter, "even though the price for the Atari 2600 is usually around $139 and Mattel's Intellivision is close to $250."

Discount stores were the most often cited outlet for a video game console purchase, with 32.3% of all respondents saying they would buy there in 1983. Mass merchants placed second with 18.3% of potential purchasers saying they would shop there. A surprising 5 in 10 shoppers say they are unsure of where they will buy a game machine, leaving a sizable segment of the market up for grabs.

***Price dictates where** shoppers will buy video game consoles in '83.*

Price is the determining factor for which store consumers will choose next year. Of survey respondents who gave a reason for picking a store, 58.9% said low or discounted price.

The primary age group of shoppers for a video game cartridge is from 30 to 45, most of whom have two or more children. Those with family incomes above $20,000 are four times as likely to buy a console as those with lower incomes. □

Video games have family appeal

Number of children	% of survey base	% of game console buyers	% difference
0	59.2	21.6	– 63.5
1	16.4	19.4	+ 18.3
2	16.0	34.9	+118.1
3	5.7	17.3	+203.5
4 or more	2.7	6.8	+151.9

Source: *CSA*/Leo Shapiro & Associates

Video cartridge market exploding

Retailers willing to stock the widest selection of video game cartridges will reap the greatest share of sales in 1983, just as they did this year. In 1982, an estimated 70 million cartridges were sold with GMers picking up 65% of the nearly $1.6 billion in total sales.

"The play's the thing," says an industry insider. "If the software companies keep new and innovative games flowing into the stores, sales will stay high."

According to this year's *CSA*/Leo Shapiro poll, 3.9% of all consumers say they might buy a game cartridge in 1983. This number, though, appears low as 5.3% of consumers say they are in the market for a game console. Industry sources note that within the first three months of owning a game machine, consumers buy an additional three to five games.

Many retailers compare the cartridge business to razors and

blades. Once the machine is installed, customers are constantly returning to pick up a new cartridge.

And they're looking for the best price available. Nearly 4 out of 10 survey respondents say they will shop a particular store for discounted prices for games. At the same time, a high 16.2% say selection is the No. 1 reason.

"Department stores are going to stay near the top of the heap for cartridges," says a Sunbelt department store dmm, "because we can afford to carry the broadest selection of software. Sure, a discounter will probably beat our sales for best sellers like Donkey Kong or Pac-Man. But with more than 300 titles available they just can't spend the inventory dollars on a game that sells steadily, but not spectacularly, and we can."

Only specialty stores scored higher than department stores among shoppers who say that selection is the reason to shop a particular store. And while the 13.3% of consumers who cited department stores because of selection was 1.9% fewer than those who chose a specialty store for selection, it was almost two-and-a-half times the rating for either discount stores or mass merchandisers. Overall, 23.5% of those planning a purchase would buy in a department store.

Families with older children buying video cartridges

Age of children	% of survey base*	% of cartridge buyers*	% difference
Under 3	23.8	18.8	−21.0
3-5	28.0	18.8	−32.9
6-11	47.5	51.8	+ 9.0
12-17	48.2	59.8	+24.1

**Totals equal more than 100% due to families with more than one child.*
Source: *CSA*/Leo Shapiro & Associates

Young baby boomers, those under 25 years of age, are a prime target for retailers. Parents, clearly buying for their children, also form a very strong potential market for the games. More than a third of video game customers are aged 35-44 years old, even though they make up only 18.2% of all survey respondents. □

Telephone market splits in two

Consumers are getting serious about their plans to purchase telephones in the year ahead.

This year's *CSA*/Leo Shapiro & Associates Consumer Buying Intentions Study finds more than half of the customers who are considering a telephone purchase to be actively shopping the item, up from 32.5% in 1981.

Retailers say the surge in shopper traffic and sales is being prompted by a growing awareness among consumers of the advantages of telephone ownership. One industry observer notes that the inclusion of rental charges in monthly telephone statements as a separate item is having a particularly strong effect on demand for non-Bell equipment. "Customers can compare the cost of buying an instrument from the phone company with the prices for other available models," he says.

At the same time, a flood of television advertising for cordless units, like Uniden's featuring Jack Nicklaus, is boosting sales faster than any other subcategory.

"The market is splitting into two tiers now," says a Midwestern department store dmm. "People are either going for a very basic unit, or they're looking at cordless models."

According to the Shapiro data, nearly half of all potential purchasers say they expect to spend less than $50 for a telephone and 18.2% say they will pay less than $30. These are tremendous increases over 1981 perceptions of price. Last year only 3.8% of all shoppers said they would spend under $30 and 6 out of 10 said they expected to spend between $50 and $150 for a telephone.

At the high end demand has nearly doubled from 1981 to this year, with 4.4% of all shoppers saying they expected to spend more than $200 for a telephone. This segment of potential telephone purchasers should grow even faster as prices continue to drift downward for top-end cordless telephones.

While 14% of all consumers say now is a good time to make a major purchase to avoid rising prices, two-thirds note that a telephone purchase would be delayed if they cut back on their spending. This delay may be negated by Federally mandated personal telephone ownership slated for next year.

Heavy advertising and high rental costs have spurred sales increase.

Telephone shoppers favor prices under $50

Price	% of potential buyers who plan to pay
Under $50	39.7%
50-99	19.8
100-124	8.0
125-149	5.1
150-199	2.8
200-299	2.5
More than $299	1.2
Not answering	20.9

Source: *CSA*/Leo Shapiro & Associates

Even though most consumers say they would delay buying a telephone if they cut back on their spending, potential purchasers are slightly more secure in their jobs compared to shoppers for other products studied. More than three-quarters of phone shoppers say family members will not face employment problems in 1983 compared to 61.8% of all respondents.

Telephones appear to be especially attractive to singles and very large families. While these two groups account for more than 30% of telephone customers, they make up less than 20% of the households in the country. Singles alone account for one-quarter of those who purchased or plan to buy their own phone. □

Appeal expands for phone answerers

Once strictly a business tool, the telephone answering machine is gaining in acceptance for home use. And no longer do the devices appeal solely to singles and two-person households. The biggest demand is coming from large families.

While 13.1% of respondents in this year's *CSA*/Leo Shapiro Consumer Buying Intentions Study say there are five or more members in their family, they make up 20.4% of those who bought or plan to buy a telephone answerer.

Although slightly fewer people say they might buy an answerer in 1983 than said they would buy one this year, those who are considering the purchase are very serious in their shopping. Six out of 10 potential buyers have already shopped for the item. A year ago, only one-third said they were active shoppers.

More than half of those who are considering the purchase say they will probably go to either a telephone specialty store or an electronics store, while 33.8% say they will shop a general merchandise chain. In 1982, though, only 24.9% of those who bought an answering machine went to a chain.

Sources at department stores and mass merchandisers agree that they are seeing increased traffic for the answerers, and attribute it to increased consumer understanding of the product. "They know what they want," says a source at J. C. Penney, "and now they're shopping for price."

Demand for answering machines grows with education

Highest grade completed	% of polling base	% who bought or might buy	% diff.
8th grade or less	9.5	0.0	—
9-11th grade	9.4	2.0	– 78.7
H.S. graduate	37.6	18.6	– 50.5
Some college	22.8	30.8	+ 35.1
College graduate	13.8	26.0	+ 88.4
Post graduate	6.9	22.6	+227.5

Source: *CSA*/Leo Shapiro & Associates

When asked why they would shop a particular store, 28.4% of potential purchasers say low price is most important. At the same time, 24.8% say convenient location is the reason. This emphasis on location is the highest of any hard lines product.

While retailers say tumbling prices are opening up the answering machine market, consumers expect to pay considerably more for a unit in 1983 compared to this year. Potential purchasers cited prices ranging up to $799 for a unit with a mean expectation of $219, a 48.0% increase over last year's mean price of $148. □

On-the-go boomers want stereo to go

No product so perfectly matches the lifestyle of the baby boom generation as the personal portable stereo music system. For these "children of the electronic age," the go-anywhere headphone sets quench their thirst for music without offending older Americans the way portable radios and cassette players once did.

While 35.8% of respondents in the *CSA*/Leo Shapiro consumer study were younger than 35 years old, they make up just shy of half of those who bought or might buy a personal portable stereo.

Retailers claim the personal portables will become even more popular as prices reach mass market levels. A Sears spokesman notes that prices will probably bottom out early next year.

Because the mini-stereo units are evolutionary in design, most consumers have a good understanding of them and are very accurate in their price expectations. Only 16.9% of those shopping for a unit have no idea of what a unit should cost. Of those who cited a dollar figure, 54.9% say they expect to pay less than $100. According to retailers, more than 90% of their business is now being done under $100, with the majority of sales coming from stereo radio-only models priced between $29.95 and $49.95.

Because price is mentioned by 44.7% of the potential purchasers as the reason they would choose a particular store to shop, general merchandise chains should pick up the bulk of sales in 1983. Although only 37.6% of shoppers say they plan on shopping a GMer, compared to 46.0% who will shop electronics specialists, 6 out of 10 who actually bought a unit this year picked a general merchandise store.

Personal portable stereo sales concentrated in the East and West

	% of pop.	% of purchasers	% difference
New England	6.4	7.8	+ 21.9
Middle Atlantic	16.5	24.4	+ 47.9
East North Central	23.0	17.9	– 22.2
West North Central	4.0	3.3	– 17.5
South Atlantic	13.4	7.4	– 44.8
East South Central	10.7	5.4	– 49.5
West South Central	8.1	4.8	– 40.7
Mountain	5.6	12.3	+119.6
Pacific	12.3	16.7	+ 35.8

Source: *CSA*/Leo Shapiro & Associates

Name brand recognition is exceptionally strong for personal portables. In fact, Walkman, Sony's name for the first personal portable unit ever marketed, has virtually become a generic term. Even so, 7 out of 10 potential purchasers say they would consider buying a private label model.

Demand for the personal portables is highest in the Northeast and the West, but interest is growing in the rest of the country. Only in the Deep South do potential shoppers drop to half their proportion of the population. □

Recession slows VCR sales, for now

Sales of video cassette recorders may have slowed this recessionary year, but they still set the pace for electronics retailers.

More than 1.6 million units were sold, compared to approximately 1.2 million last year. Currently, more than 5% of American households have a VCR hooked up to

their televisions. Industry sources estimate this penetration will reach between 7% and 10% by the end of 1983. Already, retailers are talking about a saturated market by the end of 1986.

Only 2.5% of respondents in this year's *CSA*/Leo Shapiro study say they plan on purchasing a VCR in 1983, a 22% decline compared to the 3.2% who said they might buy in the 1981 survey.

Despite this apparent drop-off in demand, the national economy may be the determining factor in actual sales next year. "If the economy turns around and consumers feel more secure, they'll start shopping again," notes a West Coast electronics buyer. "They've got the money, they just need some encouraging sign."

VCR shoppers appear far more optimistic about their own financial situation in 1983 than they did a year ago. In the 1981 survey, only 26.5% more potential VCR purchasers said their income would outpace inflation compared to the general public. This year, three times as many potential buyers say their paychecks will beat inflation.

Even though they are optimistic, should consumers cut back on their spending in 1983, a VCR would be an easily postponed purchase. Two-thirds of potential buyers would delay their purchase and only a quarter would not.

While shoppers have a very good idea of what they can expect to pay for a VCR (three-quarters of potential purchasers mentioned a price), they're unsure of where they will shop. More than a third of potential purchasers say they have no idea where they will buy a VCR, the highest number of "don't know" shoppers for any hard line product studied by Shapiro. □

VCR buyers more optimistic about economy than a year ago

Indicator	1981 % of polling base	1981 % of VCR buyers	1981 % diff.	1982 % of polling base	1982 % of VCR buyers	1982 % diff.	% change 1981-82
Income to increase	55.2%	66.2%	+19.9%	43.4%	65.3%	+50.5%	+160.2%
Easier to pay bills this year	20.9	33.9	+62.2	18.0	28.1	+56.1	– 9.8
Not cut back on standard of living	53.0	67.4	+27.2	49.6	59.2	+19.4	– 28.7
Good time for major purchase	29.2	41.0	+40.4	27.1	45.8	+69.0	+ 70.8
U.S. economy better next year	47.9	59.9	+25.1	38.1	58.3	+53.0	+111.2

Source: *CSA*/Leo Shapiro & Associates

OLYMPUS

MICROCASSETTE™ For The Masses!

Pearlcorder™ Quality. For only $59.95 and Less*

Get ready! Pearlcorder MICROCASSETTE recording is now priced right for students, business people, homemakers...everyone who takes notes or tapes meetings and lectures with tapes one-fourth the size of standard cassettes!

The Olympus Pearlcorder S904 MICROCASSETTE recorder. Backed by an all-out mass media ad campaign. Built with precision for the reliability that has made Pearlcorder the standard for quality.

*Suggested retail price

OLYMPUS®
Pearlcorder™

Olympus Corporation of America
Pearlcorder Division, Dept. CS82-12
4 Nevada Drive
New Hyde Park, N.Y. 11042

TM signifies trademark of Olympus Optical Co., Ltd.

TV market stays strong and steady

Despite the fact that two television sets have been produced and sold for every household in America in the last 10 years alone, unit sales continue steady at more than 15 million annually.

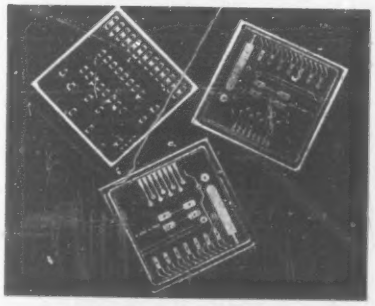
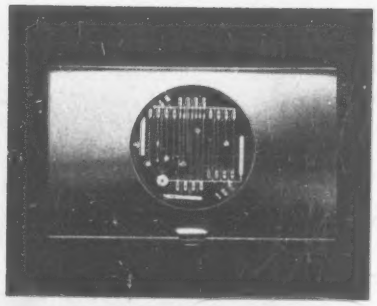
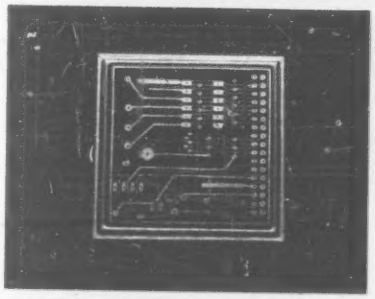
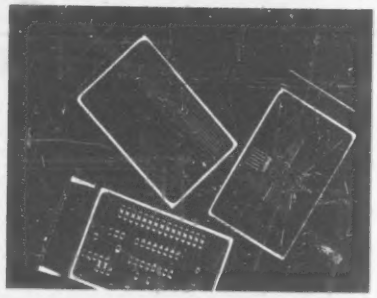
While most retailers say the bulk of their TV sales is to established families as a replacement item, there is a large market for first-time sales to early baby boomers. According to this year's *CSA*/Leo Shapiro study, nearly twice as many 20-24 year olds are shopping TVs as their proportion of the population.

GM chains were mentioned by half of those who say they are thinking about buying a TV in 1983 as the place they would shop, matching the 45.6% who bought a set this year through a GM outlet. When questioned on why they would go to a particular store, 42.9% said "price or discounted price" was the most important consideration. A strong 14.3% said they would go to a store where their past buying experiences had been good.

Surprisingly, no potential purchasers say the brand of TV set is unimportant, either for a nationally advertised brand or a private label. And while 31.5% of those in the market for a new TV say they definitely want a particular national brand, three-quarters of the shoppers will consider the store's own brand when they are looking. Three out of 10 potential purchasers say there is a very good chance that they will buy the store brand.

Most potential TV buyers are shopping for a portable or table model color set and expect to pay between $300 and $699 for it. Fewer than 1% of survey respondents say they are in the market for a large-screen projection television. Sales of projection TVs dropped nearly 20% this year and department store buyers say volume may plummet further in 1983.

All income groups are relatively strongly represented among shoppers, except for those earning less than $10,000 who make up .3% of the TV shoppers compared to their 16% of the population. □

UNIQUE COMPUTER CHIC

THE COMPUTER CRAZE TURNS INSIDE OUT

Actual printed circuit boards create a new look in gifts and accessories for adults and children. Build sales on the computer and video boom. Products and packaging in line with the times.

COMPUTER CREATIONS© FOR ADULTS

SHORT CIRCUITS© FOR KIDS

Retailers and manufacturers representatives please contact

COMPUTER FX inc

P.O. Box 467
Okemos, Michigan 48864
(517) 349-6900

ALL RIGHTS RESERVED COPYRIGHT COMPUTER FX INC OKEMOS MI 1982

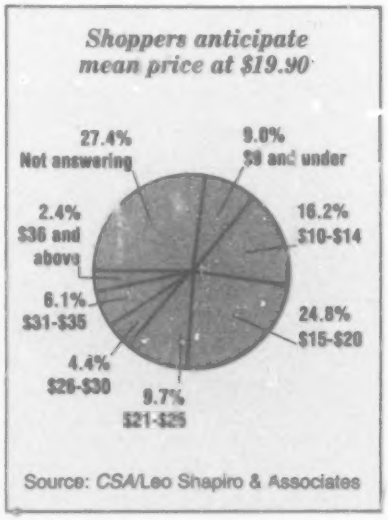
***The majority of shoppers** for table linens report no brand preference.*

Table linens boost dept. stores

Table linens are not a high priority for consumers in 1983, points out research from the *CSA/Leo Shapiro & Associates* study. Of the 37 hard lines products reviewed, table linens attract one of the lowest percentages of prospective shoppers for the next 12 months, with only popcorn poppers, instant cameras and moisturizing lotion generating less interest.

Slightly more than 1 in 10 of the consumers polled say they purchased table linens last year and roughly 1 in 20 say they might buy next year. Moreover, if table linen shoppers are forced to curb spending next year, 53.5% say they will delay this purchase. Two-fifths will not put this expense off.

When it comes to actually making the purchase, table linen shoppers appear to have their minds made up as to which store to shop; only 16.4% are undecided. Of those consumers who are planning to buy table linens, 42.3% say they will shop a department store. This was the only hard lines category in the survey in which department stores turned out to be the market share leaders.



Additionally, the Big 3 catalog chains stand to grab 28.3% of the table linens business, giving them a slight edge over discounters' 24.5% of the market. Penney's contributes 13.7% of the mass merchants' total while Sears accounts for 11.7% and Montgomery Ward, 2.9%. Product specialty stores comprise 5% of the future market.

These figures differ dramatically from the previous market share breakdown based on where customers last shopped. Department stores and product specialty shops lose business to the Big 3 catalog chains and discounters. In the past the breakdown was: department stores, 59.7%; discounters, 16.8%; mass merchants, 7.7% (including Sears 4.1% and Penney's 3.6%), and product specialty stores, 8.7%.

According to more than a third of the table linens shoppers, the primary factor influencing their store selection is price. Other reasons cited include convenient location, 15.3%, quality, 12.1% and selection, 9%.

But despite consumer concern over prices, table linens appear less price sensitive than other home products. More than one-fourth of the shoppers had no idea of cost while 41% expect their purchases to be between $10-$20.

Additionally, the majority of shoppers say they have no brand preference. The remaining 43% are split almost equally between a store brand and an advertised one. Moreover, of the customers preferring the advertised or store brands, neither group shows a strong commitment to purchasing only the brand mentioned. As a matter of fact, only 11.7% of those wanting a store brand and 16.8% of those preferring an advertised brand say they definitely want that brand.

In general, three-fourths of the table linens shoppers have family incomes over $20,000 and of that group, one-fifth report incomes over $40,000. □

Garnering 60% of shoppers' *responses, name brands outdistance store brands.*

Price is key to air cleaner sales

Electric air cleaners are heavily promoted gadget items that seem to have found a home as an impulse item in discounters and full-line department stores.

Results of the *CSA*/Leo Shapiro & Associates survey indicate air cleaner prospects have little notion of the product's price and, therefore, are more susceptible to impulse purchases.

For example, those who said they "might buy" an electric air cleaner within the next 12 months said they'd expect to pay anywhere from a low of $15 to as much as $500 (20.2% said they would pay between $21 and $25).

But despite price confusion, air cleaner prospects know where they want to shop—discounters and department stores. More than 30% said they would buy an air cleaner at a discount store (only 6.3% cited K mart specifically) followed by 24.3% at a full-line department store.

The air cleaner prospects' background is also about as varied as their price perceptions. According to the survey, annual household incomes of likely buyers could fall under $20,000, between $20,000 and $30,000 or more than $40,000. There are also prospects who have had "some college," have a college degree and others even hold postgraduate degrees.

One constant trend, however, is air cleaner prospects prefer advertised brands. Almost 60% said they would buy a name brand while only 11.3% say they would purchase a store brand. Another 29.8% said they have no preference.

Good news for retailers who are targeting this market is that shoppers (who also feel their financial standing will improve) say they won't delay that air cleaner purchase if by chance they're forced to cut family spending. □

Cold will warm heater volume

Retailers could have a banner year with portable heater sales if forecasts for a bitterly cold 1982-83 winter season hit the mark. The one dark cloud could be safety questions raised in a recent article in *Consumer Reports*.

The electric, quartz and kerosene units—like air-conditioners—usually sell well during severe weather conditions. This is especially true of the Southern regions which last year suffered a colder than normal winter. Of those consumers who purchased heaters in the winter of 1981-82, 30.5% lived in the Middle Atlantic States, 14.6% in the South Atlantic States and another 12.5% in the East South Central region.

According to the *CSA*/Leo Shapiro & Associates survey, the top portable heater prospects are blue-collar workers with a mean income of about $23,000 (the lowest among the survey's hard lines product categories). This shopper is also married, with one child, a high school graduate and is in the 30- to 49-year-old age range.

These shoppers are also changing stores. The Shapiro poll points out major shifts in prospects' buying intentions compared with those who bought a portable heater last year.

K mart increased its have bought/will buy market share comparison by 84.3%, as did Sears by 36.4%. Other discounters, however, dropped 42.4% while full-line department stores decreased by 41.9%.

Location and convenience seems to be a factor among discounters. Of

Heaters draw low-income group

	% of consumers who bought/might buy		
Income	Portable heater	Ceil. fan	Air cleaner
Under $20,000	45.4	34.5	27.0
Not answering, but under $20,000	1.3	0.0	0.0
$20,000-$30,000	27.2	34.5	27.9
$30,000-$40,000	9.3	10.5	13.6
Over $40,000	11.3	16.3	26.0
Not answering, but over $20,000	0.5	0.0	1.7
Not answering	5.0	4.2	3.8
Job			
Professional	12.7	11.4	13.2
Manager	11.8	18.7	22.3
Sales worker	7.4	13.5	12.5
Craftsman	11.8	7.4	12.8
Operative/ kindred worker	16.2	6.9	9.4
Retired	13.5	20.6	14.5
Other	26.6	21.5	15.3

Source: *CSA*/Leo Shapiro & Associates

those who shop for hardware products at K mart, 19.4% cited location/convenience as the primary factor. Only 2.5% said they would shop "other" discounters for location and convenience.

Sears, meanwhile, scored points with its traditional hardware department strengths—quality (27%), location/convenience (16.8%) and satisfaction/past experience (14%).

Most of those surveyed said they had no brand preference which could also prove advantageous to house-brand dominated Sears. While only 11% of the consumers said they would prefer a store brand, 54.8% said brand name was no factor in their decision. □

Ceiling fan sales to whirl at Sears

The *CSA*/Leo Shapiro & Associates survey of those planning to purchase a ceiling fan shows Sears increasing its potential market share at the expense of discounters, specialty shops and Montgomery Ward.

The nation's biggest retailer increased its have bought/will buy market share comparison by 76.9%, from 16.0% to 28.3%. Meanwhile, the competition took a dive. Discounters (other than K mart) dropped 30.6%, specialty stores decreased 48.4% and Montgomery Ward was down 59.7%.

Quality, convenience and Sears' strong store brand hardware line appear responsible for the shift. More than 16.0% of those surveyed said they preferred store brands (up from 9.0% in 1981) and another 51.2% said they had no brand preference whatsoever.

Other than Sears, home improvement stores also showed an impressive increase in ceiling fan prospects. Only 3.4% of those asked bought a ceiling fan at a home center in 1981. But in 1982, 13.1% said they might buy the fan at a home center.

There won't be many baby boomer dollars spent on ceiling fans. This category's shoppers are an older lot. Not only is the group's median age about 45, but 22.8% are more than 65 years old.

***Baby boomers aren't** prime targets for ceiling fans; average shopper is 45.*

They're also financially secure consumers who don't expect much change in their income status. Almost 35% make between $20,000 and $30 000 while another 16.3% make more than $40,000 annually.

One thing, however, can be said about ceiling fan owners—once they buy one, there's a good chance another purchase is in the offing. According to industry insiders, 16% of all homes have a ceiling fan. And of those who own one, 40% have purchased an additional fan. □

Brands count big in luggage market

There are nearly as many contradictions in the luggage market as there are gimmicky come-ons from the airlines to beat the high cost of travel.

In fact, according to the *CSA*/Leo Shapiro & Associates study, the most likely luggage customer splits into two distinct groups. Both groups are in a stable financial position and are in a position to travel frequently. Twenty to 24 year olds make up the first group, with 19.1% having bought or planning to buy. The second group are members of a five-person household and earn in excess of $40,000 a year.

Despite the fact that both consumer groups earn over $20,000, which should insulate the market somewhat against economic vulnerability, the survey shows that the luggage trade is a highly price-sensitive purchase that 61.6% of all potential luggage consumers will delay when cutting back on spending.

Lower price tags move luggage

Price expect to pay	Total per cent
$17-18	0.8
$19-20	0.3
$21-25	1.3
$26-30	3.0
$31-35	1.9
$36-50	10.5
$51-99	13.1
$100-124	11.7
$125-149	3.8
$150-199	4.8
$200-299	8.1
$300-399	6.4
$400-499	2.7
$500-699	0.3
$700-799	0.8
$800 and over	0.3
Not answering	30.2

Source: *CSA*/Leo Shapiro & Associates

Over one-half of the potential luggage customers, 55.7%, say they want to buy brand names. And over one-third, 34.1%, said they definitely want the advertised brand. To buy that name, however, these customers expect to pay between only $51 and $99.

Store shopping patterns also underline the price sensitivity of the luggage market. Past purchasers of luggage shopped mostly in full-line department stores (31%), outranking Sears (9.5%), J. C. Penney (8.8%) and Montgomery Ward (1.8%). Looking ahead to the next year, full-line department stores lose ground, named only by 26.1% of the potential shoppers. Consumer interest in shopping Penney and Ward escalates. □

Chains zapped by bug killers

Beware discounters: ultraviolet bug killer shoppers may be heading to local hardware stores.

Last year, many bug zapper owners were burned when the units' starter motors suffered blowout problems. Although suppliers claimed they rectified the problem, the latest *CSA*/Leo Shapiro & Associates survey shows a significant increase in hardware stores' share of the future market when compared with purchasing patterns in 1981—more than double, in fact.

Price is lawn & garden key

	K mart	Other disc.	Mass merch.	Sears	Ward	Penney	Dept. store	Specialty store	Hardware store	Home impv.
Price/discount	49.2	61.9	15.3	15.8	16.5	0.0	33.4	25.6	20.1	35.5
Selection	6.2	3.4	3.2	2.4	0.0	32.9	23.1	10.6	15.3	24.9
Quality	10.2	1.5	23.0	25.2	16.8	0.0	12.7	6.1	8.9	11.5
Satisfaction/ past experience	0.0	1.5	17.5	19.3	12.0	0.0	11.6	22.5	16.7	9.4
Location/ convenience	18.7	7.7	13.8	14.3	14.8	0.0	16.2	9.3	22.7	0.0
Credit Card	0.0	0.0	10.9	8.1	16.5	50.6	0.0	0.0	1.3	0.0
Service/repair/ guarantee	6.2	0.0	9.4	9.0	14.0	0.0	2.4	3.1	0.0	0.0
Other	0.0	1.5	4.3	5.1	0.0	16.5	0.0	4.6	10.7	18.7
Not answering	9.5	2.5	2.6	0.8	9.4	0.0	0.6	18.2	4.3	0.0

Source: *CSA*/Leo Shapiro & Associates

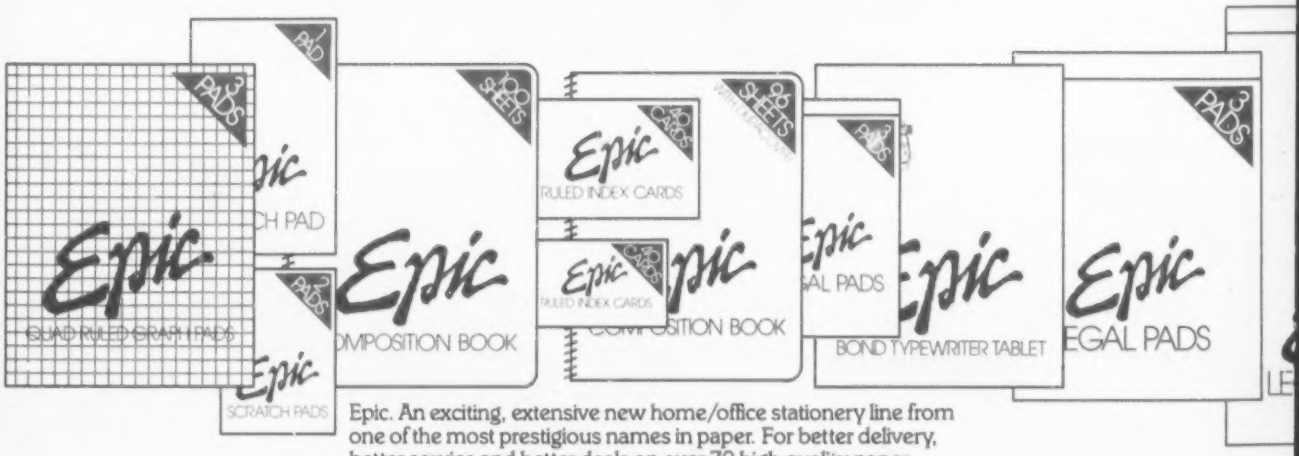
Sears, however, has managed to retain the largest share of past customers and future prospects. In the "have bought/might buy" comparisons, Sears increased its market share by 19.1%.

Both Sears and hardware store outlets scored high marks for product satisfaction and convenience when shoppers were asked why they will patronize a particular store.

About 44% of those surveyed said they shopped hardware stores for lawn & garden products because of convenience and product satisfaction/past experience. Sears received high marks for quality (more than a quarter of those surveyed) followed by satisfaction (19.3%) and price (15.8%).

The results indicate that shoppers will visit stores they believe will back the product—especially important in light of the bug killers' past mechanical problems. These developments do not bode well for discounters. This group (not including K mart, which slightly in-

Just say the word.



Epic. An exciting, extensive new home/office stationery line from one of the most prestigious names in paper. For better delivery, better service and better deals on over 70 high quality paper products—just say the word.

Diamond International Corporation
Bolivar Street, Canton, MA 02021, (617) 828-4200

creased its prospects) dropped 28.7% in the have bought/might buy comparison.

Next summer, industry insiders say, could be a strong year for bug killer sales. Consumers are better educated about the once-mysterious ultraviolet devices and have a better idea where they'll shop and how much they'll pay.

According to the *CSA*/Leo Shapiro survey, almost 60% said they expect to pay between $36 and $124 for a bug killer. □

Economy puts snag in barbecue sales

Barbecue grills seem to have settled into two pricing categories—shoppers have a prediliction for grills under $50 as well as more elaborate units in the $150 range.

According to results of the *CSA*/Leo Shapiro & Associates poll, 41.4% of those surveyed expect to pay less than $50 for a grill (21.5% between $36 and $50) while 20.6% say tickets will run between $125 and $299 for a grill.

If they do buy a barbecue, it will probably be at a discounter. About 36% of those asked said they would buy a grill at a discount store, followed by a full-line department store (18.7%) and the Big 3. Sears accounts for 14.7% of all prospects while K mart garnered 11.2%.

K mart, however, has dropped from the lofty heights of last year's *CSA*/Leo Shapiro survey. In 1981, 32.3% of those asked said they "might buy" a barbecue grill at K mart. □

Big 3 to bag more lawn mower volume

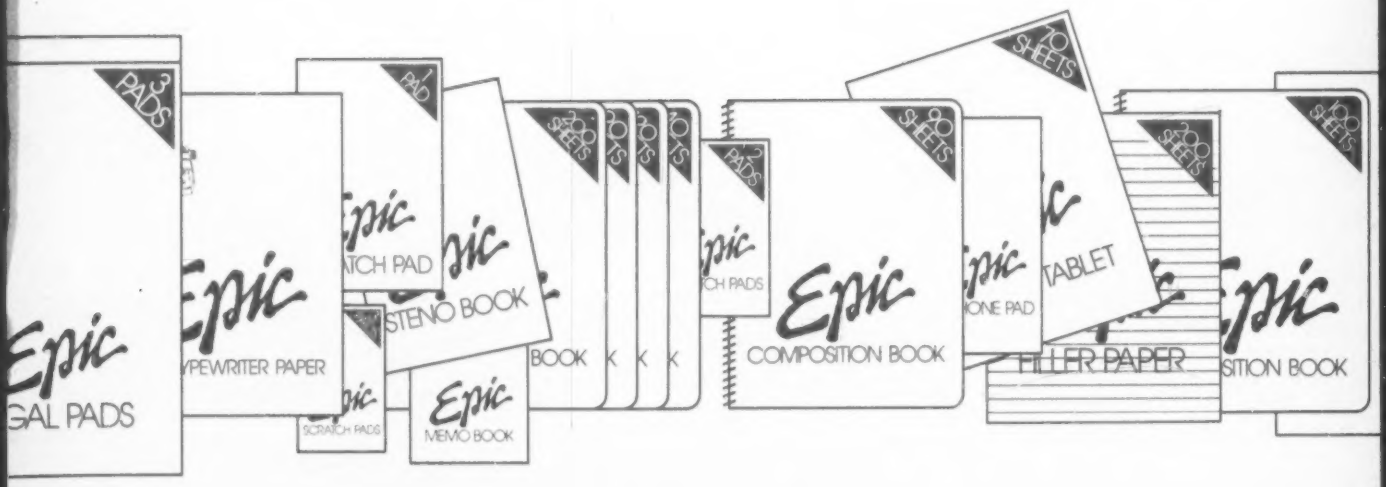
Winter or not, it's a good time for lawn mower retailers, especially the Big 3 catalog chains who are siphoning a large share of the market away from discounters.

The Big 3 increased their market share (when comparing last year's buyers with this year's prospects) by 48.8% while discounters plunged 61%. Sears alone jumped 48.3% and Montgomery Ward, 53%.

The Ward and Sears store brands may have been a factor in these market share increases. While more prospects said they preferred advertised brands (39.6% to 25.8% favoring private labels), shoppers who plan to purchase store brands are more loyal than their name brand counterparts.

Home improvement centers and hardware stores also improved market share positions. Home centers almost tripled market share in the have bought/might buy comparisons while hardware stores jumped 25.6%.

The lawn mower shopper is a well-to-do consumer who achieved a high income at an early age and without the benefit of a college education (36.2% are in professional or sales jobs). They are also an optimistic group that has managed to save without cutting back. □



For your local representative, call:
(In CT, MA, RI) Creative Sales, 784 Front Street, Weymouth, MA 02188, (617) 331-6950
(In ME, NH, VT) Forest Co., Inc., 820 Stevens Avenue, Portland, ME 04104, (207) 797-3396

Cameras eying sales slump

Different customers for different cameras

Income	% of camera customers		Expect to pay	% of camera customers	
	35mm	Instant		35mm	Instant
$5,000-$10,000	3.5	7.1	$21-$25	0.0	5.0
$10,000-$15,000	5.1	12.5	$26-$35	0.5	9.3
$15,000-$20,000	13.9	16.2	$36-$50	0.5	28.1
$20,000-$30,000	31.1	29.6	$51-$99	1.1	14.9
$30,000-$40,000	15.9	12.0	$100-$124	5.4	5.9
Over $40,000	21.2	16.9	$125-$299	37.8	7.6
All other	6.9	1.4	$300-$399	20.3	0.9
Not answering	2.4	4.3	$400-$499	5.1	0.0
			$500-$699	7.1	0.0
			All other	4.0	3.6
			Not answering	18.2	24.7

Source: *CSA*/Leo Shapiro & Associates

One thing 35mm and instant picture cameras have in common is soft sales in bad economic times. And if families are forced to cut expenses, the planned camera purchase will be *the* first to go, according to the *CSA*/Leo Shapiro & Associates survey. Three-quarters of the consumers said they would put off a 35mm purchase while 76.5% would delay their instant camera plans.

The trend is supported by Shapiro's active market statistics pinpointing consumers who have shopped the lines in recent months and camera industry figures. In 1982, the market for 35mm shoppers declined slightly from levels projected by Shapiro in 1981. Instant cameras, meanwhile, suffered a major market decline. This drift is supported by industry figures which show since 1979, 35mm unit sales have declined 14% while instant sales dropped 29.5%.

But that's where the economic similarities end. For example, there are different reasons for poor sales. While both the 35mm and instant cameras are victims of the recession, the instants are also plagued by industry competition (the new Kodak disc camera system, for instance) and the boom in one-hour photo processing shops.

Target customers also differ. Of those likely to purchase a camera, the 35mm shopper is a college-educated baby boomer who holds down a "professional" position while the instant prospect is older, may have "some" college experience and is employed in a "technical" profession.

Price priority for 35's: Price is becoming a priority among 35mm shoppers as K mart and private party sales (flea markets, etc.) are becoming more attractive to the presold baby boomers who are the most likely camera customers.

Based on the Shapiro statistics, K mart's market share (comparing those who purchased 35mm cameras in the past year with those who said they plan to buy in the next 12 months) more than doubled. Over half the potential camera customers mentioned "price" as the reason for shopping K mart while 11.6% noted selection—a positive reflection of the retailer's high sku camera department.

Another indication of price-conscious shoppers was a sharp market share drop for specialty stores. In 1981, 44% of 35mm buyers in the *CSA*/Shapiro survey bought a 35mm at a specialty camera store. This year, only 34.9% say they plan to buy at a specialty store—a 20.7% drop.

For other retailers, discounters as a group declined 18% in the have bought/will buy market share calculations. This indicates that discounters, other than K mart, may not be remaining price competitive, or had better beef up assortments.

Private party camera transactions, however, increased dramatically. This group, which usually involves the sale of used equipment, more than tripled its share of prospects in 1982 compared with actual 1981 buyers.

These consumers doing all this retail hopping are the baby boomers who, according to the Shapiro survey, are more likely to purchase 35mm cameras.

About 46% of those surveyed fall into the 20- to 30-year-old age bracket. Within this group, 33.3% have either college or graduate school degrees and are working in one of the professions (doctor, lawyer, etc.).

They're also well paid and, consequently, optimistic about salary prospects and chances for an economic recovery. Nearly three-quarters earn more than $20,000 annually, compared with 47.2% of the total survey population.

Camera customers are also willing to pay for a high-end 35mm SLR camera. More than half say they expect to pay between $200 and $399. This virtually eliminates the "snapshooter" 35mm, such as the Canon "Sure Shot," from the running for the baby boomer's dollars. □

Quick photo labs slow down instants

There's no real mystery behind poor instant camera sales.

- Many consumers consider the instant camera a frivolous purchase during hard economic times. Some 76.5% of all instant camera customers say they would delay their purchase if they curtail spending—tops in the *CSA*/Leo Shapiro survey.
- The new Kodak disc camera has become a popular alternative.
- One-hour photo shops have effectively changed the camera hobbyist's definition of "instant."

Competition, however, has been the major determinant in the instant camera slide.

Kodak, earlier this year, introduced the state of the art snapshooter called the "disc" which employs a motor drive advance system as well as the easy loading, disc film. At the time, industry analysts pre-

dicted the three-model line (with price points comparable to instants) would cut into snapshooter sales be it the instants or Kodak's own instamatic line. They were right. According to Kodak officials, the Rochester-based giant plans to ship eight million disc units by the end of 1982.

Another roadblock for instants has been the proliferation of one-hour photo labs.

In the past two years some 1,000 shops have opened nationwide and that massive growth—abetted by franchising—is expected to continue. The labs have virtually stripped the instants of their trump card—speed. Not only can the labs have pictures back within an hour, but the color photos are better quality than instant camera snapshots.

Within the instant market, specialty camera stores doubled and Sears more than tripled market share in the have bought/will buy comparisons. Drug store outlets and discounters declined, indicating the price gap may have narrowed between the specialty and price-oriented stores as retailers heavily promote price to move the sluggish selling instants. Selection was the primary reason for choosing Sears and the specialty shops.

Potential instant camera customers seem to have a firm grip on price points. Nearly 60% said they expect to pay between $20 and $99 for an instant camera which is well within the established price range.

But the instant shopper is also less likely to part with that money than his 35mm counterpart. They make slightly less (58.5% make more than $20,000 annually compared with 68.2% for the 35mm buyer) are older (almost 62% are more than 35 years old) and thus may have to divert more funds to the essentials of family life.

They're also less optimistic about their own economic prospects than the 35mm group—bad news for retailers with heavy instant camera inventories. □

Don't miss these important 1983 Trade Shows

50th NATIONAL VARIETY MERCHANDISE SHOW

FEB. 12-15 (SAT. THRU TUES.) N.Y. COLISEUM

FEB. 13-15
N.Y. COLISEUM

For more information on exhibiting or attending, write or call
THALHEIM EXPOSITIONS, INC.
98 Cutter Mill Road
P.O. Box 707
Great Neck, NY 11021 • (212) 357-3555

STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION
(Required by 39 U.S.C. 3685)

Title of publication: *Chain Store Age—General Merchandise Edition.* Publication No. 01931350. Date of filing: 10/1/1982. Frequency of issue: Monthly. No. of issues published annually: 12. Annual subscription price: $9. Complete mailing address of known office of publication: 425 Park Ave., New York, N.Y. 10022. Complete mailing address of the headquarters or general business offices of the publishers: 425 Park Ave., New York, N.Y. 10022. Full names and complete mailing address of publisher, editor and managing editor: Publisher—J. Roger Friedman, Lebhar-Friedman Inc., 425 Park Ave., New York, N.Y. 10022. Editor—Murray Forseter, Lebhar-Friedman Inc., 425 Park Ave., New York, N.Y. 10022. Managing editor—Charles J. Humphrey/Helene Adelman, Lebhar-Friedman Inc., 425 Park Ave., New York, N.Y. 10022. Owner: Estate of Arnold D. Friedman and J. Roger Friedman. Complete mailing address: Lebhar Friedman Inc., 425 Park Ave., New York, N.Y. 10022.

Extent and Nature of Circulation	Average No. Copies Each Issue During Preceding 12 Months	Actual No. Copies of Single Issue Published Nearest to Filing Date
A. Total no. copies (net press run)	36,400	37,200
B. Paid circulation		
1. Sales through dealers and carriers, street vendors and counter sales	17	—
2. Mail subscription	25,542	25,541
C. Total paid circulation (sum of 10B1 and 10B2)	25,559	25,541
D. Free distribution by Mail, carrier or other means, samples, complimentary, and other free copies	5,778	5,871
E. Total distribution (sum of C and D)	31,337	31,412
F. Copies not distributed		
1. Office use, left over, unaccounted, spoiled after printing	5,063	5,788
2. Return from news agents	—	—
G. Total (sum of E, F1 and 2—should equal net press run shown in A)	36,400	37,200

I certify that the statements made by me above are correct and complete. Signature and title of editor, publisher, business manager or owner: Joseph J. Perrone, vice president.

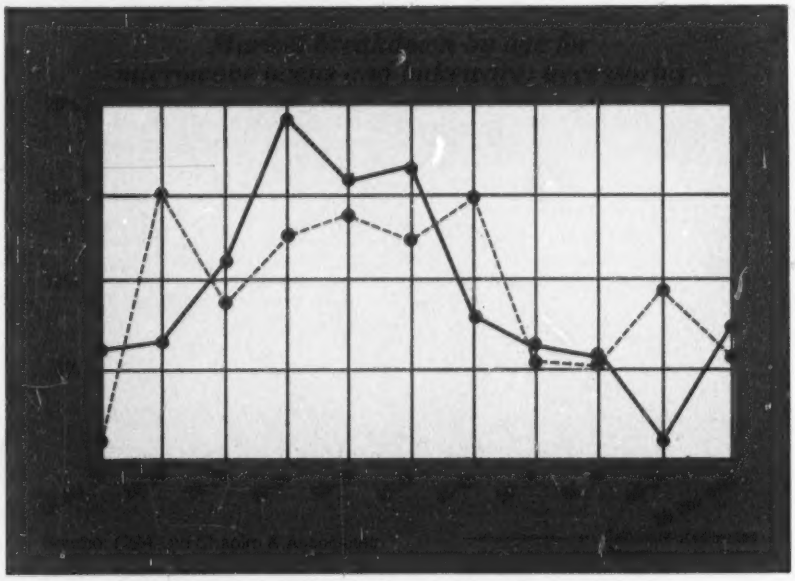
Microwaves are the No. 1 priority among consumers actively shopping in '83.

Microwave ovens–quietly exciting

Of the 37 hard lines products tracked by the *CSA*/Leo Shapiro & Associates study, microwave ovens are the No. 1 item consumers say they are actively shopping for and might buy in 1983. It even rated higher than headline-grabbing consumer electronics. Having a piece of this potential market could mean higher dollar volumes for retailers with ailing housewares or appliance businesses.

Data from the survey shows that 5.5% of the total population polled bought a microwave oven within the last 12 months, up half a point from last year's anticipated market. Slightly more than 4% of those polled indicate that they will buy one in 1983 and 68.3% of that group are actively shopping the market for this product. However, the appliance ranked third highest in economic vulnerability with only one-fifth of the shoppers saying they will not delay this purchase if forced to cut spending in the future.

It appears the microwave oven customer is better heeled than the average consumer and is perhaps buying the product for its convenience appeal. In general, the shopper is 39 years old, a high school graduate with some college and a member of a three-or-four-person family. Nearly two-thirds of these consumers have family incomes that top $20,000; the mean is $29,700. Of the 37 product categories, this rates as the third highest mean income which stands to reason considering that microwaves generally retail for $200 plus.



Surprisingly, consumer interest in the product spans all walks of life. Approximately 20% of the shoppers say their chief breadwinners are managers; 12.2%, craftsmen; 11.8%, professionals; 11.1%, sales-workers, and 11% retired.

Of those planning to buy microwave ovens in 1983, nearly a third haven't decided which store to shop. This is down substantially from the 56% undecided last year. Of those naming a store, 35.4% are planning to make purchases at the Big 3 catalog chains with 24.5% of them citing Sears specifically. Another 19% say they will buy at department stores while 24.5% prefer specialty stores. Only 8.7% mention discounters. Department stores, up 6.3%, Ward down 4.1%, and specialists down 5.4% showed the most change.

The No. 1 factor affecting shoppers' store selection is price. Quality is the second most important reason. Surprisingly, factors like service or repair, selection and store location pull little weight in swaying the decision.

For the most part, consumers are quite knowledgeable about microwave oven prices. Only 15% of those planning purchases had no idea of the cost. The median price estimated by all shoppers is $453. Roughly 50% expect tickets to range between $400 and $699. An-

other 30% anticipate paying between $200 and $399 while only 5% expect prices to exceed $700.

When it comes to brand, 53.1% of the shoppers want an advertised brand, 13.9% want the store brand and 33% have no brand preference. It appears that retailers can improve their margins and perhaps gain market share by offering the less well-known brands at competitive prices.

However, of those shoppers who mentioned an advertised brand, 31.7% definitely want the name item while 5.2% say it doesn't make a difference. Figures are less dramatic for those shoppers mentioning a store brand. Here, only 3% of the group definitely want the store-brand merchandise and 7.1% say it doesn't make a difference. □

***Poppers stirred surprisingly** strong interest in households without children.*

Popcorn poppers poop out in '83

Of the 37 hard lines products examined in the *CSA*/Leo Shapiro & Associates study, popcorn poppers shape up as the second least active next year. Only 1.4% of the total population interviewed say they might buy one within the next 12 months, suggesting the category has hit the saturation point.

However, of all those planning popcorn popper purchases, 4 out of 10 say that they will buy the item regardless of economic pressures, giving it a fairly low vulnerability level.

Price appears to be the No. 1 issue with the shoppers. According to the survey more than 75% expect the item to cost less than $30 and of this group, 53.5% anticipate the price tag to be less than $20. The median price estimated by those planning purchases is $20. Less than 15% had no idea of cost.

Additionally, 52.9% of the shoppers say that price is the major influence in store selection. Quality, selection and guarantee have minimal effects on this decision.

For the most part, catalog showrooms and factory outlets will increase market share during 1983, while the Big 3 catalog chains and department stores lose out. The leaders in the past, and continuing into next year, are discount operations. Only one-fifth of the shoppers remain uncommitted to a store.

Though generally associated with traditional families, poppers showed strong interest in homes without children. Forty-four per cent of the households who bought or might buy one had no children. □

Bakeware draws older customer

□ Research from the *CSA*/Leo Shapiro & Associates study suggests consumers first buy microwave ovens and, after familiarizing themselves with their capabilities, then seek out accessories. Slight differences in consumer profiles illustrate this.

Although both items appeal to families with incomes exceeding $28,000 and are markets dominated by white-collar workers, bakeware/accessories customers are generally older. The mean age is 41.3 years, roughly two years older than the mean for microwave oven customers.

The survey also indicates that consumers do not necessarily buy their bakeware at the same stores they shop their ovens. Moreover, bakeware shoppers appear more decisive when it comes to store selection. Less than one-fifth of those planning purchases in 1983 have not made up their minds yet as compared to the nearly 1 in 3 oven shoppers who are undecided.

Like the microwave oven customers, nearly one-third of the prospective bakeware consumers plan to shop the Big 3 catalog chains. Another 20.4% expect to make their purchases at department stores.

However, unlike the oven customers, only 9.5% of the bakeware shoppers plan to shop appliance stores. Their third choice, with 19.2% of the respondents, are discount chains.

Both bakeware and oven shoppers cite low prices as the primary consideration when selecting a store. The second most important factor for the bakeware customer is the store's selection. Quality, on the other hand, rates poorly among the bakeware consumers though it's a prime consideration for microwave oven shoppers.

Surprisingly, where bakeware customers plan to shop differs from where they previously shopped last year. Discounters lose ground to both department stores and the Big 3.

Perhaps discounters, as well as specialty retailers, should be relooking their selections and pricing structures in order to regain market share. □

***GMers may boost their** market share by stocking higher-end lines.*

'83 sales bright for auto sound

Car stereo systems are making steady headway as they plow through rough economic seas that have left most automotive aftermarket products floundering.

Retailers and manufacturers alike are forecasting comfortable 10% to 20% gains in unit sales and dollar volume increases as high as 30% for 1983. With the recessionary economy forcing more consumers to postpone new car purchases, owners, and especially younger ones, are putting the best audio systems they can afford into the vehicles they already possess.

"It's a real step-up business now," says a New England discount store buyer. "There's still a stable promotionally priced business, but the real growth is coming from AM/FM cassette decks selling for $179.99 and up."

Not surprisingly the strongest market for auto sound systems is among the youngest respondents in this year's *CSA*/Leo Shapiro Consumer Buying Intentions Study. One in 3 potential purchasers is under 25 years old although that group only accounts for 12.2% of survey respondents.

And while two-thirds of all car stereos will probably be sold to baby boomers, the product remains quite attractive to consumers up to 45 years of age. After 45, though, the percentage of potential purchasers trails the percentage of respondents for every age group.

Car stereo market is strongly youth-oriented

Age	% of polling base	% of purchasers	% difference
Under 20	2.0	7.7	+ 285.0
20-24	10.2	27.5	+ 169.6
25-29	12.6	17.1	+ 35.7
30-34	11.0	11.1	+ 0.9
35-39	10.6	11.4	+ 7.5
40-44	8.0	8.3	+ 3.8
45-49	7.8	5.5	− 29.5
50-54	6.7	6.4	− 4.5
55-59	6.9	1.5	− 78.3
60-64	7.3	2.5	− 65.8
65 and over	16.9	1.0	− 94.1

Source: *CSA*/Leo Shapiro & Associates

Auto sound buyers mirror other consumer electronics shoppers in their demand for nationally branded items, although they appear to be more willing to consider a store brand. Only 19.9% of those considering a car stereo purchase for 1983 said there was "no chance of buying the store's own brand rather than a nationally advertised brand." Just under half (46.6%) noted that there was a good chance they might choose a store brand audio system for their cars.

Although potential buyers cite price as the No. 1 reason they would shop a particular store for a car stereo, 11.8% of potential shoppers said quality was most important and past satisfaction rated tops with 9.6% of shoppers. This emphasis on quality and satisfaction may boost GMers' share of the market if more of them begin stocking higher-end auto sound products. Currently, only 25.2% of those who bought an auto sound system this year made the purchase at a general merchandise store compared to 59.1% who went to an electronics specialist.

Two out of 5 potential buyers said they expected to pay between $150 and $300 for a car stereo system next year, a price range where most sales actually occur, according to retailers. At the same time, 18% of the shoppers say they are looking at high-end systems with prices as high as $1,400 plus.

Despite the fact that a car stereo is an easily delayed purchase, 39.2% of those who recently bought a system or plan on buying in 1983 note that now is a good time to make a major purchase to beat impending price increases.

Car stereo purchasers are generally optimistic about their own financial security and that of the nation as a whole. Only 43.4% of all survey respondents say they expect their income to increase in 1983, while 65.3% of those in the car stereo market say their earnings will improve next year. More than half of the potential car stereo buyers say the United States economy will improve next year, one-third more than the overall population. □

***Thanks to new colors** and looks, consumers are again buying jeans.*

Jeans sales on the upswing

Consumers are donning the uniform of the 60's

Retailers take note: Erratic jeans sales appear to be a thing of the past. Sales should be on the upsurge this year, according to research compiled by *CSA*/Leo Shapiro & Associates.

The study revealed 60.3% of the women and 57.4% of the men in the United States expect to purchase jeans in 1983, compared, respectively, to 45.9% and 36.7% who indicated purchase intentions last year.

These enthusiastic buying responses were the largest recorded by Shapiro for the 12 apparel categories tracked. What's more, even if the economy takes a nosedive and consumers are forced to cut back spending, 58.3% of the women and 64.5% of the men affirm they will stand by their decision to buy jeans.

Nonetheless, consumers are not opting for designer jeans, indicates the Shapiro data. This fact comes as no surprise, as department stores such as New York's Bloomingdale's and Minneapolis' Dayton's have pulled back on this category and moved into stonewashed and overdyed jeans. Both are traffic stoppers, report department store buyers.

Asked about what jeans they would buy in the coming year, consumers polled by Shapiro gave a vote of confidence to Levi's. Nearly 40% of the men said they would buy this brand, while over 20% of the women would also opt for Levi's. Trailing behind were store brands. A little over 16% of the men and women nodded to private label jeans. Next, men selected Wrangler while women chose Lee, followed by men preferring Lee and women, Wrangler. Calvin Klein, Jordache and Sasson were all favored by less than 4% of the men and women in the United States.

Consumers are most likely to begin looking for jeans at department and specialty stores. Nearly 1 in 3 consumers said they would go to department stores, while almost 1 in 4 said they would shop specialists such as The Gap and Miller's Outpost.

When it comes to actually buying jeans, 36.3% of the women said they would go to department stores and another 23.4% would head to specialty stores. Mass merchants such as Sears, Penney and Ward pulled 21.8% of women shoppers. Of the catalog chains, Sears scored the most favorable response among women: 12.9% would go there, while 7.3% would head to Penney's. Less than 2% said they would shop Ward.

Discounters were chosen by almost 10.5% of the women, while offpricers drew 3.8% of these shoppers.

When men decide to buy, they also choose department stores. One in 4 were inclined to shop this type of store. Close behind were mass merchants, then specialty stores. Unlike women, however, men chose Penney over Sears, 13.6% vs. 9.1%, respectively. Ward pulled less than

Strong store preference for apparel

No Store Preference*	Product	No Brand Preference*
8.6%	Jeans (All)	23.8%
6.1	Jeans (Women)	24.2
11.3	Jeans (Men)	23.4
14.8	Athletic Shoes (All)	33.6
16.7	Athletic Shoes (Women)	31.5
13.2	Athletic Shoes (Men)	35.3
7.8	Infants' Sleepers	60.9
9.3	Children's Overalls	41.7
6.9	Swimsuit	61.1
10.9	Women's Blazers	63.4
4.8	Sweatshirt Dress	71.0
4.4	Teddy	60.0
12.3	Dress Shirt	50.0
15.1	Casual Slacks	55.8
13.6	Socks	14.5
18.2	Activewear	69.1

*% consumers without preference

Source: *CSA*/Leo J. Shapiro & Associates

1% of the men shopping for jeans. Specialists drew 21.9% of the men, while off-pricers garnered 5.5% of these shoppers.

On the whole, the price of the jeans determined the type of outlet consumers chose. Nearly 40% said price was the most important factor in store preference. Next to influence a consumer's choice of outlet was selection. Nearly 16% of the consumers claimed this as a reason to shop where they did. Convenience was important with 9.8% of the shoppers.

How much are consumers willing to pay? One in 4 said they would shell out between $15 and $19.99. This price was favored by both men and women, who were, however, at odds about paying between $10 and $14.99. A little over 22% of the men opted for this price bracket, while only 16.7% of the women were willing to pay this sum.

While men and women disagree over the $10-$14.99 price bracket, they were in accord about others. No one said they would pay less than $10. Roughly the same percentage (a little over 20%) said they would elect to pay between $20 and $24.99.

The days of spending $50 or more for a pair of jeans appear to be over for both men and women. Very few polled by Shapiro said they would plunk down this amount. □

More than 1 in 4 shoppers will buy jeans in the Northeast

	% consumers who might buy		
	Total	Men	Women
New England	7.8	8.1	7.6
Middle Atlantic	20.4	17.7	22.9
East North Central	22.7	23.4	22.1
West North Central	4.7	4.0	5.3
South Atlantic	9.0	8.9	9.2
East South Central	11.8	13.7	9.9
West South Central	7.1	8.1	6.2
Mountain	4.7	4.8	4.6
Pacific	11.8	11.3	12.2

Source: *CSA*/Leo Shapiro & Associates

Blazers suit working women

Do women own enough blazers? No, according to the *CSA*/Leo Shapiro & Associates research. One in 5 women in the United States said they expect to buy a blazer next year.

Women between the ages of 25 and 44 will account for 50% of the sales, revealing blazers are wanted by working women. In fact, women earning over $20,000 are more likely to purchase a blazer than those earning less, 62.4% vs. 36.6%, according to the Shapiro data. Blazer buyers say they are in better shape financially than they were a year ago. In addition, nearly 50% claim they will be in even better condition one year from now.

Only 7.9% of the women between the ages of 20 and 24 will buy a blazer, perhaps because they are not yet dressing for success, just as the same percentage of women between the ages of 45 and 49 will buy one, perhaps because they already own a sufficient number.

The remaining purchases are pretty evenly divided among women above age 44, with one blip. Nearly 13% of women aged 50 to 54 might buy blazers next year.

Clearly the Shapiro data indicates that it is women in the peak business years who are making blazer purchases. But the reseach also clearly underscores that blazer purchases will be deferred if the economy tailspins. Nearly 4 out of 5 women will put off purchasing a blazer if their personal finances dip. It is not a necessary purchase.

As a result, price does play a role in store selection for women. As with most other categories, the largest number of women (28.6%) said they thought of price first when picking a retailer. Quality followed, with 1 in 5 placing that on top of her list. Selection and satisfaction rated next, with an almost equal number of women deeming these important criteria for store choice: 12.2% vs. 11.2%, respectively.

Department stores are the first place women shop for blazers, indicating they are succeeding in attracting working women. Offering a wider selection and personal shopping services, department stores account for nearly 60% of the lookers, points out the Shapiro data. This type of store surpasses all other retailers. Even specialty stores are way behind. Less than 15% of the blazer shoppers said they would look at stores such as The Limited and Casual Corner.

Mass merchants such as Sears and Penney have not made much headway in the category. About 12% of the women said they would peruse catalog chains. Penney's drew a 5.9% share of the women surveyed as did Sears.

As most discounters have not yet gone after "working women" apparel, it is not surprising that only 7.9% of the women decided to look first at these stores. The vote was evenly

Brands are not important to blazer shoppers

Brand	% consumers mentioning
Jones of N.Y.	2.0
Evan Picone	2.0
Act III	2.0
J. G. Hook	1.0
Pecor	1.0
Store brand	7.9
Other	20.8
Not answering	63.3

Source: *CSA*/Leo Shapiro & Associates

split between K mart and all other discounters. Four per cent said they would go to one or the other. Catalogs also have not proved themselves to be a vehicle for blazer shopping. Just 1% of the women surveyed by Shapiro said they would look there, and only 1% said they would start at off-pricers.

When actually buying a blazer, women follow almost the same paths taken by the lookers. Department stores are by far the most important retail outlet. Then specialty stores are chosen, but these trail way behind. Less than 15% of the women polled by Shapiro said they would really buy at specialists. The Big 3 catalog chains pulled less than 13% of consumer interest. Sears led Penney: 6.7% vs. 5.6%, respectively.

Only 6.6% of the blazer shoppers said they would buy at discounters. The same percentage of mail order shoppers would buy from catalogs as would look. But for off-pricers, the percentage stays at 1%.

The largest percentage of women would pay between $40 and $59.99, revealing that many women are buying moderate priced merchandise or waiting for brands to go on sale. Still, 1 in 4 said they would purchase blazers priced above $60. □

Department stores are the preferred apparel outlet

Product	All households might buy '83	K mart	Other discounters	Sears	Ward	Penney	Dept. store	Off-price	Specialty	Other
Teddy	10.1%	6.0%	7.0%	9.3%	0.0%	11.6%	62.8%	0.0%	7.0%	2.3%
Women's Blazer	22.7	2.2	4.4	6.7	0.0	5.6	60.0	4.4	14.4	2.3
Men's Activewear	12.5	0.0	4.4	13.3	0.0	17.8	40.0	6.7	17.8	0.0
Sweatshirt Dress	13.9	6.8	1.7	10.2	0.0	8.5	52.6	3.4	15.3	1.5
Women's Swimsuit	16.2	3.0	7.5	10.4	0.0	3.0	52.3	3.0	13.4	7.4
Men's Casual Slacks	19.6	1.4	2.7	15.1	2.7	12.3	35.6	4.1	26.0	0.1
Women's Athletic Shoes	24.6	2.2	15.6	2.2	2.2	6.7	11.1	0.0	57.8	2.2
Men's Dress Shirt	24.1	4.3	5.4	14.0	3.2	11.8	26.9	7.6	24.7	2.1
Children's Overalls	12.2	18.4	11.2	20.4	2.0	10.2	21.4	3.0	10.2	3.2
Women's Jeans	50.3	6.5	4.0	12.9	1.6	7.3	36.3	6.4	23.4	1.6
Infants' Sleeper	7.2	16.9	16.9	22.0	3.4	10.2	17.0	0.0	10.2	3.4
Athletic Shoes (All)	28.0	6.7	10.6	6.7	1.0	3.8	11.5	0.0	57.7	2.0
Jeans (All)	58.8	7.3	5.6	11.1	1.3	10.3	32.1	6.0	22.6	3.7
Men's Jeans	57.4	8.2	7.3	9.1	0.9	13.6	27.3	5.5	21.8	6.3
Men's Socks	25.0	16.8	14.7	16.8	3.2	13.7	21.1	3.2	7.4	3.1
Men's Athletic Shoes	31.2	10.2	6.8	10.2	0.0	1.7	11.9	0.0	57.6	1.6

Source: *CSA*/Leo J. Shapiro & Associates — *Base: All who named a store*

'Sweat' dressing: fashion, not fad

Sweat" dressing, which appeared on the scene last year, seems to be shaping up as a trend, not a fad among the young and not so young.

Retailers wondering if active looking apparel that has added heftily to the bottom line will continue in popularity can take heart. Next year, 14% of American women expect to buy some of this apparel, according to the *CSA*/Leo Shapiro poll.

The brainchild of New York designer Norma Kamali, sweat dressing consists, in the main, of skirts, pants, tops and coats made of activewear fabrics such as fleece.

The active looking street clothes clearly appeal to the under-20 age group and the 30- to 44-year-olds.

FASHION FOR THE WAY AMERICA LIVES.

Casual comfort and easy style are the fashion cues for today's sportswear. Shirley's classic knit tops of 50% Dacron® polyester/50% cotton capture this lifestyle perfectly. Smartly mixing and matching with skirts, pants and jackets; sporting our own unique embroidery. Missy tops sizes S-M-L, jacket, pant and skirt sizes 6-16. Call toll-free 1-800-241-6447.

Shirley OF ATLANTA

National Headquarters: 4200 Shirley Dr. S.W., Atlanta, Georgia 30336 (404) 691-6400.
Sales and Merchandising Office: 1370 Broadway, N.Y., N.Y. 10018 (212) 244-1490
Regional Offices: Atlanta, Charlotte, Chicago, Dallas, Kansas City, Los Angeles

***Consumers regard sweat** dressing as a fashion, not a fad.*

Surprisingly, the 25-29-year-olds feel "so so," the Shapiro data indicates.

To appeal to this diverse group, retailers are going to have to offer priced-right sweat dressing, as these shoppers choose a store on the basis of its prices. Forty per cent of the potential shoppers say that price is the prime reason for store preference, perhaps due to the fact that they are not yet willing to invest a lot of money in this type of clothing.

In addition, selection also plays an important part in determining where they shop. More than 1 in 4 want a wide assortment when they shop for sweat dressing.

Where they look corresponds very closely to where they buy. The majority of shoppers look and purchase in department stores. They approve of the prices and selection found at these stores.

More than 1 in 5 women begins to look in catalog chains, but that percentage slips slightly when they buy. A little less than 18% actually spend at these chains. About 10% glance through Sears' selection and also purchase sweat dressing there. But while nearly 13% start to shop at Penney's, only 8.1% say they will actually buy there, perhaps because Penney's prices are more than this shopper wants to pay.

Specialty stores garner almost 13% of the lookers, but when sweat dressers buy slightly more opt for these stores, thanks in part to their mix that is less expensive than consumers first perceive.

A little over 11% head to discounters and 8.1% decide to buy at these stores. Roughly 7% begin to look *and* buy at K mart.

Off-pricers drew 1.6% of the lookers, but jumped slightly when people bought: 3.2% said they would shell out money for sweat dressing at these stores. Mail order is not considered as an outlet for this type of apparel, according to the Shapiro data.

How much are shoppers willing to spend for sweat dressing? The majority say less than $39—not within Kamali's price range, but within the range of most of the look-alike merchandise. A little more than 1 in 4, however, will pay $50 or more for sweat dressing, making them potential Kamali buyers.

Shoppers who intend to buy this type of apparel are not going to be swayed by the vagaries of the economy, reveals the Shapiro research. So much do they want this apparel, that a little over half will definitely buy this merchandise even if their personal fortunes take a turn for the worse. □

Nearly 1 in 3 women in the Chicago/Detroit area expect to buy sweat dressing in '83

	% consumers who might buy
New England	7.8
Middle Atlantic	14.1
East North Central	32.8
West North Central	6.3
South Atlantic	10.9
East South Central	4.7
West South Central	4.7
Mountain	7.8
Pacific	10.9

Source: *CSA*/Leo Shapiro & Associates

Women cuddle up to teddies in '83

In the past 10 years, the lingerie market has exploded. Items such as teddies and camisoles have won women's favor with the result that many department stores and some discounters have been reporting yearly double-digit increases in lingerie for the last five years.

In fact, lingerie is so important today that 1 in 10 women say they will purchase a teddy in the next year.

Teddies were unheard of a number of years ago, says a buyer from a Midwest department store. Today, they are sold in department stores, with more and more discounters stocking them.

Still, consumers are not as yet accustomed to buying teddies in discounters or specialty stores, for that matter. Over 50% of the women in the United States who might buy a teddy, according to the *CSA*/Leo Shapiro Consumer Buying Intentions survey, say they will start to look for a teddy at department stores. They will also buy there.

Because lingerie is such an ego-intensive purchase, women maintained the reason why they chose the store they did was due in large part to the selection of teddies carried by a store. For a teddy wearer, selection was deemed just as important as price. Both ranked the same with 22.7% of the women listing these factors as top priorities in

***Teddies are becoming an** accepted part of women's lingerie wardrobe.*

More than 1 in 5 shoppers in the Midwest will buy teddies	
	% consumers who might buy
New England	8.3
Middle Atlantic	14.6
East North Central	22.9
West North Central	4.2
South Atlantic	6.3
East South Central	12.5
West South Central	8.3
Mountain	12.5
Pacific	10.4
Source: *CSA*/Leo Shapiro & Associates	

store preference.

According to the Shapiro data, women with incomes over $20,000 are more likely to purchase a teddy than those who earn less than $20,000: 55.6% vs. 44.4%, respectively. The teddy wearer is also young. Over 50% are between 20 and 34.

As might be expected, retailers are going to have to offer teddies that are attractive to please these shoppers. Satisfaction also plays an essential role in store choice. Nearly 16% will choose a store on the basis of past experience, and an almost equal number (14%) claimed quality is important.

Consequently, teddy shoppers will head to catalog chains as the second place to look. More than 1 in 5 make this store type No. 1 to visit when looking for their teddies. Sears is the first choice among catalog chains, with 13.3% preferring the nation's largest retailer. Nearly 9% said they would go to Penney's. No one would start to look at Ward.

Only 8.9% would begin to look at discounters. Surprisingly, less than that number are willing to windowshop at specialty stores. Only 6.7% would begin there.

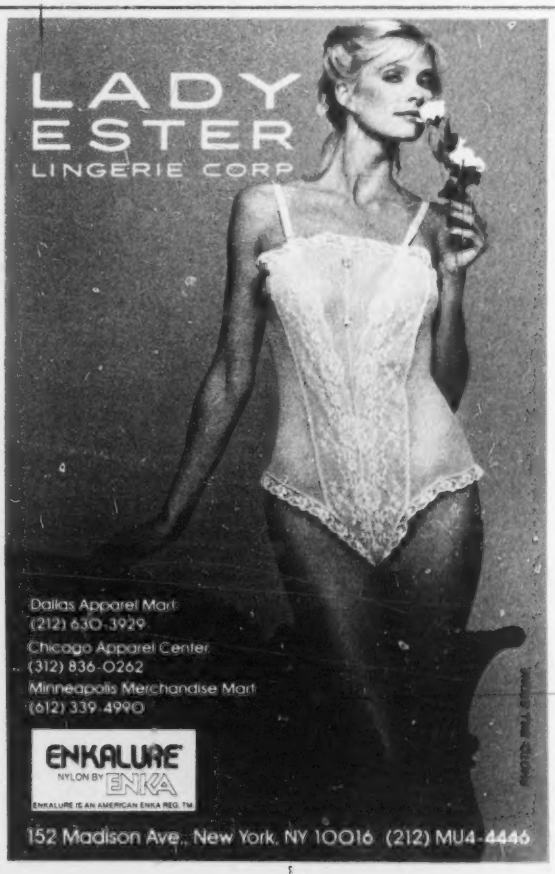
Where consumers shop mirrors the data on where they look. As mentioned, department stores are the prime retail outlet to buy teddies. Next come catalog chains.

Nonetheless, unlike the lookers, potential buyers chose Penney as the first place to buy teddies among catalog chains. Over 11% said they would purchase there, while 8.9% said they would go to Sears.

Mass merchants and specialty stores placed low with potential buyers, as they did with lookers. Both accounted for only 6.7% of consumer interest. Catalogs were not a vehicle used, perhaps because these women feel they must try on this type of merchandise.

By the prices quoted in the Shapiro study, women appear to be willing to pay for a teddy. The largest number of women (24%) said they would spend between $20 and $24.99, within the price range of department stores.

At the store, 13.3% of the shoppers are most likely to buy a Vanity Fair teddy. This brand was the only



one to score above 10% favor with shoppers. Store brands ranked next, with 6.7% in search of private labels. Vassarette and Maidenform ranked as No. 1 choice among 4.4% of the shoppers. The majority of shoppers, however, are just not sure what brand they will buy.

Since a teddy is not a necessity, consumers will defer purchasing if the economy takes a turn for the worse. Three-fourths of the potential buyers will delay spending if they trim back outlays. □

Price/value worth more than fashion

Men's colored and scantily cut briefs may be termed "fashion underwear," but shoppers aren't purchasing the fancy pants just for their fashion appeal. In fact, men and women polled on men's fashion underwear buying habits for *CSA* by Leo Shapiro & Associates found fashion a poor reason to pick a particular store for underwear purchases. Only 2.7% of the men queried and 2.1% of the women bought men's underwear where they did because of that store's fashion selection.

Indeed, shoppers applied the same criteria to fashion underwear that they might to less flashy, more mundane underwear purchases. Women listed quality (mentioned by 21.3%) as the main reason for picking an outlet for men's fashion underwear. Another one-fifth were concerned about price and value.

While men were also interested in quality and good value, they would most likely pick a store for underwear purchases due to convenient location, cited by 23.4% of the men polled. Quality (listed by 17.1%) and price/value (noted by 15.3%) were also concerns.

With male shoppers interested in a convenient store that offers quality garments at a good price, it's not surprising that the largest group of men planned to shop Sears first for fashion underwear needs. More than one-fourth of the men polled planned to look for fashion underwear at the nation's largest retailer, and one-fifth planned to make a purchase there.

Sears rates high as source for men's fashion briefs

Type of store	% of men who might buy there	% of women who might buy there
Sears	21.6	18.1
Ward	1.8	2.1
Penney	3.6	6.5
Dept. stores	19.8	10.6
Discount stores	27.5	39.4
Specialists	6.3	3.2
Not answering	24.4	18.1

Source: *CSA*/Leo Shapiro & Associates

The more price-conscious women were most likely to look and buy at discounters, listed by 38.3% as the first place they'd look and by 39.4% as the place to buy. The catalog chains rated second with women, with 28.7% planning to buy there. Men were almost as likely to buy at a department store (noted by

***Quality plays an** important role in the selection of men's briefs.*

19.8%) as at a discount store (22.5%). Only 1 in 10 women planned to either look for or actually buy fashion underwear at a department store.

While women are often credited for buying the bulk of men's fashion briefs as gifts, the Shapiro study shows that men are as likely to buy the line for themselves. In the past year, 34.2% of male respondents had bought fashion underwear, and 35.1% were inclined to make a purchase in the coming year. Another one-fifth had received fashion briefs as gifts. Of the women, 31.9% had bought men's fashion underwear in the previous year, and one-quarter were considering buying the briefs in the future.

Baltimore Oriole pitcher Jim Palmer must be given some credit for making men's fashion underwear noticeable as well as accepted. Although almost half of the men and women polled had no definite brand in mind for future fashion underwear purchases, Jockey, which Palmer models, was the most frequently mentioned brand. Almost one-fourth of the men and 13.8% of the women were interested in getting Jockey. Another 13% would buy Fruit of the Loom, and almost 1 in 10 listed Hanes as a brand they might purchase.

Since the catalog chains rated highly as outlets for purchasing fashion underwear, it might be assumed that their private labels would be popular choices. However, only 3.6% of the men and 4.3% of the women planned to buy Sears or Penney brands.

While pitcher Palmer undoubtedly has a loyal following among blue-collar workers, the fashion underwear he peddles remains most acceptable to younger, professional men. Almost half of the men who planned to buy fashion briefs were in the 20-34-year-old age group and a comparable number were white-collar workers, while only a third held blue-collar jobs. Men who had attended or graduated from college or graduate school were the most likely to buy fashion underwear, as were those with household incomes over $20,000 per year. □

Athletic shoes keep on truckin'

Economic doldrums or not, retailers can expect sales of athletic shoes to keep cash registers ringing in the coming year. Athletic shoes trailed only jeans as the apparel item shoppers interviewed by Leo Shapiro & Associates were most predisposed toward buying.

Twenty-eight per cent of those queried thought they might buy athletic shoes, and 36.1% of these potential customers had actively looked for the footgear in the last month—the highest incidence for both men's and women's apparel. In these days of tight money, the moderately priced (shoppers expect to pay $26.06, on average), sturdy, comfortable foot coverings apparently make sense. Athletic footwear has become acceptable on city streets, campuses, malls and even in offices.

The bulk of the retail dollars that athletic shoes will be pulling in will come from men, mainly the 20-24 crowd—for whom athletic footwear is *de rigueur*—and the fitness-conscious 30-35- and 40-45-year-olds. Women trailed men in buying susceptibility in all the categories studied. For example, only one-quarter of the women surveyed thought they might buy athletic shoes in the coming year, compared with almost

one-third of the men who were predisposed toward buying. While almost equal numbers of men and women had shopped for athletic footwear in the last month, 35.2% of the women (vs. only 27.9% of the men) said they'd put off buying if they were tightening purse strings.

When women were planning to buy, they were much more price-conscious than males. Both sexes listed specialty stores as the first place they'd go to actually buy sport footwear.

Men were more likely than women to buy athletic shoes at a catalog chain, particularly Sears. One of every 10 men surveyed picked Sears as their first choice for buying athletic footwear, while only 2.2% of the women would buy there. Four-fifths of the men said they'd buy shoes in the same type of store where they originally looked. Women were slightly more fickle, with only 74.1% opting to buy at the same place they first shopped.

Overwhelmingly, women picked price as the reason they would shop at a certain type of store, and less than 1 out of 10 was concerned with quality in athletic footwear. Three out of 10 men choose a store on the basis of its athletic shoe assortments. Price came in a close second in picking a store, followed by quality, for which 12.5% of the men voiced concern.

Women are more price-sensitive when buying athletic shoes

Reason for choosing a particular store

	Total	Women	Men
Price	33.0%	39.2%	28.1%
Selection	23.5	15.7	29.7
Quality	11.3	9.8	12.5
Convenience	6.1	2.0	9.4
Satisfaction	13.0	11.8	14.1
Other/don't know	13.1	21.5	6.2

Source: *CSA/Leo Shapiro & Associates*

Since they tended to shop at higher-priced outlets, such as sporting goods stores, and expressed interest in a wide selection and better quality of shoes, men expected to pay more for a pair of athletic shoes than women. The median price men expected to pay was $29.80; women thought they'd spend $8 less.

While more women had cut back on apparel expenditures in the last year (60.7% of the women in the market for athletic shoes vs. 44.8% of the men), they would be more inclined to buy athletic shoes now than men. Reason: to get a better deal before inflation pushed prices upward. □

***Men spend the most dollars** on athletic shoes, even in recessionary times.*

1-800-251-4089 PUTS OUR GEAR IN HIGH GEAR.

Work clothes that sit on your shelf are sitting on cash. But Big Ben by Wrangler® work clothes move fast. Sophisticated inventory computers keep us informed of the in-stock position on our entire line.

And 1-800-251-4089 gives you instant access to those computers. In just minutes, we can process your order. Or give you a precise update on your shipment.

There's no faster way to get America's fastest-moving work clothes moving. Give us a call. Big Ben by Wrangler.

HARD WORKIN' CLOTHES.™

Price, assortments sell swimsuits

Retailers catering to the 25- to 39-year-old market should rack up healthy swimsuit sales in 1983, according to the *CSA*/Leo Shapiro research on consumer buying intentions. This age group is expected to account for nearly 50% of the swimwear volume, points out the data.

In fact, 16.2% of all women in the United States anticipate buying a bathing suit next year. Even if the economy slips and consumers curtail spending, almost 50% of those buying will still purchase swimsuits.

The largest number of women (nearly 1 in 5) intend to spend between $30 and $39.99 for a swimsuit, indicating swimsuit purchases are planned, not impulsive. Studies by Du Pont reveal women buy bathing suits once every three years.

The same percentage of women (15.3%) will spend $15 to $19.99 as will spend $25 to $29.99. Just a little over 10% will pay less than $15 and an equal percentage will shell out more than $40. The remaining women opt for prices between $25 and $29.99.

Although women expect to pay for bathing suits, price is still the first thing they think about when they select a store. Some 26.1% have this objective on their mind. Nonetheless, women are determined to find an assortment of suits when they shop. Selection was the next factor in store choice, with 1 in 5 claiming this made a difference as to where they shop.

Quality was also important to shoppers buying swimwear. Nearly 16% cited this as a store criterion. As might be expected, satisfaction was singled out as well by women buying bathing suits. Just about 15% credited this as a reason for picking out the store type they did.

Nearly 50% of the women will begin to look for bathing suits at department stores. No other store type received this kind of mention from consumers, indicating shoppers perceive department stores as having the best prices and selection, especially since nearly half will actually buy at a department store.

***Women reportedly purchase** swimwear once every three years.*

Specialty stores and mass merchants were favored next by shoppers looking for swimsuits. But these store types were far behind, each garnering 13.9% of women's attention. Among mass merchants, Sears placed first with lookers, scoring with 9.7% of the women. Penney's followed, with 4.2% noting they would start there. No one chose Ward.

A little less than 10% said they would browse through discounters. About 3% named K mart first, while 6.9% said they would look in all other discounters. Mail order was also rated as a place to look. A little less than 5% said they would finger shop. Off-pricers were selected by 2.8% of the women.

Where consumers actually buy bathing suits is very similar to the data on where they look.

Some 50% said they would go to department stores for swimsuits. Next choice would be specialty stores that concentrate on swimsuits. After these two store types, consumers would go to mass merchants such as Sears and Penney. Nearly 14% of the women consider these stores when buying. Sears again racked up the largest percentage, with 10.4% of the women buying there. Three per cent said they would go to Penney's.

The same percentage who said they would look in discounters will also buy at this store type. Three per cent will shell out money at K mart, while about 7.5% will buy at all other discounters.

Although nearly 5% said they would look at catalogs for bathing suits, only 3% will order from these books. But the same percentage of women who said they would go to off-pricers will also buy there.

Of the swimsuit brands cited, Jantzen ranked first, with 12.5% of the women looking for this name in stores. Not far behind were store brands. □

Swimsuit buyers look for style not brands

Brand	% consumers mentioning
Jantzen	12.5
Catalina	6.9
Roxanne	1.4
Danskin	1.4
Cole	1.4
Store brand	8.4
Other	6.9
Not answering	1.1

Source: *CSA*/Leo Shapiro & Associates

Price keys sales of kids' sleepers

Baby boomers may be having children, but they are not anticipating buying a lot of apparel for their kids, reports the *CSA*/Leo Shapiro & Associates research on consumer buying intentions.

Take infants' sleepers. Only 12.4% of the baby boomers might buy one in the coming year, points out the data. Rather, mothers are reportedly using hand-me-downs and relying on gifts for their newborn.

Consumers buying infants' sleepers, indicates the Shapiro study, are in worse shape economically than last year. They cannot afford to buy much. Nearly 50% of them say their financial conditions have deteriorated in 1982.

***Mothers don't put sleepers** high on their shopping lists for infants.*

Demand highest for infant sleepers in West and mid-Atlantic

Region	% of poll base	% who might buy	% difference
Mountain	5.5	7.4	+34.5
West North Central	4.5	5.9	+31.1
Pacific	14.8	17.6	+18.9
West South Central	6.8	7.4	+ 8.8
Middle Atlantic	19.2	23.5	+22.4
East South Central	9.0	8.8	– 2.2
East North Central	21.5	17.6	–18.1
South Atlantic	11.8	8.8	–25.4
New England	6.8	2.9	–57.4

Source: *CSA*/Leo Shapiro & Associates

Over 60% of those buying sleepers have incomes over $20,000. Lending networks among mothers in hard-hit communities have sprung up so these pressed consumers don't have to purchase a lot of goods from retailers.

But for those who will acquire a sleeper in 1983, the majority said they would not delay buying.

If retailers want to capture these mothers, they must emphasize price. Price was credited as the determining factor in store preference. Retailers must also concentrate on quality. This criteria appealed to nearly 20% of the shoppers, followed by convenient location. One in 7 claimed this was a necessity. Obviously, consumers with infants do not like to shop around.

As price is the key to merchandising infants' sleepers, the majority of shoppers intend to pay between $5 and $9.99. Only 13% of the consumers buying sleepers expect to pay more than $9.99.

Where are they going to look? One in 3 would start to look at catalog chains. Of the three, Sears was the first choice among lookers with 20.3% going there. Penney's rated next, with 12.5% of those just starting to look for sleepers heading to this chain.

Discounters placed second among shoppers as a place to look. A little over 31% said they would start shopping there. Seventeen per cent selected K mart, while 14% elected to go to all other discounters.

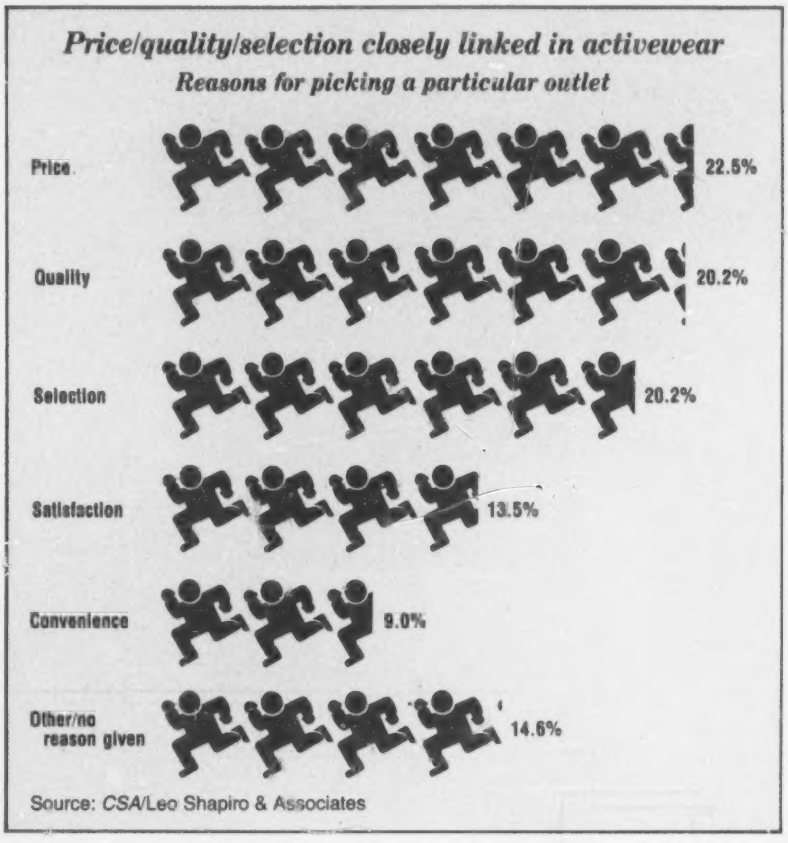
Department stores placed third as the retail store type to browse, but they trailed the Big 3 and discounters by 10 points. A little over 20% said this was their first choice. Specialists were given the nod by only 9.4% of the lookers, while 3.1% said they would go to factory outlets.

Where consumers look parallels where they shop. Catalog chains stand to win the largest number of infants' sleepers' shoppers but right on their heels are discounts.

Nearly 1 in 3 consumers expect to go to the chains for infants' sleepers. Sears was the leader among this group with 22% of the shoppers selecting the nation's No 1. retailer. Penney was next, favored by 10.2% and Ward lagged behind, with 3.4% of the shoppers going there.

Discounters were the favorites of nearly as many shoppers: 33.8%. Among the discounters, 16.9% said they would probably buy at K mart and an equal percentage said they would go to all other discounters.

Again, department stores trailed. Perceived as being more expensive than other retail operations, department stores were the choice of 15.6% of infants' shoppers. Specialty stores fared worse, with less than 10.2% citing them as a place to buy: Consumers feel they will pay even more at these shops. □



Little action in activewear

Despite being touted as "the jeans of the 80's," men's activewear is one of the least likely apparel items to be sold during these economically uncertain times. Only 12 5% of the men surveyed by *CSA*/Leo Shapiro & Associates were predisposed toward buying active apparel in the coming year, and only 2 out of 10 of these prospects had actively shopped the lines in recent months.

Activewear, viewed as nonessential apparel, is also one of the chief areas where clothing purchases would be cut back if consumers trim spending, trailing only women's blazers and teddies among the apparel items studied as a likely candidate for exclusion. Among activewear shoppers, 6 out of 10 said they had cut back on clothing purchases in general, and an equal number would also delay buying activewear if they were forced to reign in spending.

Not surprisingly then, price was the top factor when it came to picking a store to shop, and shoppers expected to pay only $33.20, on average, for activewear. However, for the low prices they expected to pay, shoppers also wanted quality and a wide selection. Quality and selection, each mentioned by 20.2% of the shoppers, closely trailed price (at 22.5%) as reasons for choosing a particular type of store.

***If men trim their** clothing budgets, activewear is slashed.*

In keeping with this price/value equation, more shoppers tended to *look* for activewear at higher-priced chains such as department stores, sporting goods stores and specialists. Fewer shoppers would actually *buy* the garments at these stores, however. Department stores were still the first place shoppers chose for buying activewear, but the catalog chains—Sears, Penney and Ward—rated a strong second (31.1% vs. 40% for department stores). However, less than 1 out of 10 men indicated a willingness to shop for activewear at a discount chain, even though many of these chains now carry private label and national branded activewear comparable to that found in department stores and the Big 3.

Brand names are of little importance to the activewear shopper. Two-thirds of the respondents listed no preference for a specific brand, and of the brands named, private label store brands got the most votes (12.1%). Only one national brand of activewear, Adidas, received any significant number of mentions (7.1%). So signs are both the Big 3 and discounters have an opportunity to gain activewear market share through a priced-right, quality private label program.

Men who were the most positive about an economic recovery were the best bets for buying activewear. The two-thirds of the respondents who saw their incomes increasing in the coming year were also the most likely to buy active apparel, as were those who were better off financially.

Those who earned in excess of $40,000 a year were the most likely to buy active apparel, while men with incomes under $20,000 were poor prospects for buying this nonessential item. Younger customers, for whom activewear has become synonymous with leisure wear, were good bets to buy the items. In particular, the under 20's and 20-24 age groups showed high susceptibility toward buying. □

NEWSBRIEFS

F. W. Woolworth chairman/chief executive Edward F. Gibbons, 63, died Oct. 26, just weeks after chartering a new company course highlighted by the closing of Woolco discount stores and the sale of FWW's 52.6% interest in Woolworth Great Britain. . . . **John W. "Bud" Lynn, 61,** a 42-year company veteran, was elected Gibbons' successor. Lynn will serve until June 1985. As vice chairman, he worked on the G. B. sale. . . . **Associated Dry Goods has confirmed** *CSA*'s August report that Stewart's would close and its Baltimore stores would be converted to Caldor discount units. . . . **Allied Stores has confirmed** *CSA*'s August report that following the Stern's-Gertz merger all stores would carry the Stern's nameplate. . . . **Federated is consolidating** administrative functions of its Tucson Levy's division with Dallas-based Sanger-Harris. . . . **AGMC-NMRI merger talks** are nearing a crucial stage. A report on ramifications of a merger will be submitted to both groups next month by Arthur Anderson & Co. . . . **Sears U.S. Merchandising income** increased 8.6% to $80.9 million in the third quarter on sales of $4.6 billion, up 2.2%. For nine months, income was up 59.4% to $144.3 million on sales of $12.9 billion, up 2.4%. . . . **Montgomery Ward's losses narrowed** to $38 million from $63 million for the quarter. For nine months the losses totaled $109 million vs. $138 million in '81. Sales dropped 6% to $3.7 billion. . . . **K mart has confirmed** *CSA*'s November report that name brand apparel departments will be rolled out in many K mart stores in '83 and that a separate, as yet unnamed, off-price chain is under consideration. *CSA* believes the chain will use existing Kresge locations. . . .**Wickes is seeking** a buyer for its $300 million Aldens catalog division. . . . **Wal-Mart founder Sam Walton** has informed his company that he suffers from hairy cell leukemia, a treatable illness that should not impede his daily activity.

Soft sales gains for October

MAJOR CHAINS	% change	OCT. SALES* 1982	OCT. SALES* 1981	STORES 1982	STORES 1981	9-MO. SALES* 1982	9-MO. SALES* 1981	% change
SEARS[1]	+ 3.8	1,593,725	1,535,551	841	858	14,321,656	14,046,816	+ 2.0
PENNEY	− 3.6	889,000	922,000	2,058	2,099	7,971,000	8,062,000	− 1.1
WARD[1]	+ 4.3	445,697	427,402	389	402	3,853,406	4,004,164	− 3.8
FEDERATED[1]	+ 9.3	518,200	473,900	377	N/A	4,258,200	3,946,200	+ 7.9
DAYTON HUDSON	+ 9.8	429,802	391,408	960	905	3,635,777	3,194,499	+13.8
MAY DEPT. STORES	+ 8.3	285,200	263,300	1,368	1,244	2,407,800	2,292,400	+ 5.0
CARTER HAWLEY HALE	+ 2.3	239,000	233,600	1,013	928	1,992,700	1,901,000	+ 4.8
MERCANTILE	+ 9.8	120,917	110,166	85	83	936,307	839,380	+11.5
K MART	− 2.1	1,183,600	1,208,534	2,403	2,362	11,633,421	11,375,784	+ 2.3
WOOLWORTH	− 2.0	521,079	531,722	N/A	N/A	5,073,097	5,001,704	+ 1.4
HOUSEHOLD MERCH.[2,3,5]	+ 1.9	248,147	243,523	3,795	3,904	2,106,681	2,102,099	+ 0.2
WAL-MART	+32.4	298,000	225,000	536	474	2,282,000	1,602,000	+42.4
T.G. & Y.	+11.9	170,627	152,513	923	929	1,453,335	1,324,883	+ 9.7
ZAYRE[4]	+20.4	184,893	153,560	617	565	1,471,083	1,231,956	+19.4
MURPHY	− 5.8	60,643	64,359	427	441	575,185	557,632	+ 3.1
ROSE'S	+ 9.6	45,603	41,604	239	235	440,154	402,347	+ 9.4
MELVILLE	+16.3	241,487	203,722	5,430	5,086	2,425,023	2,052,967	+18.1
TANDY	+18.6	189,102	159,456	N/A	N/A	1,507,909	1,266,122	+19.1
EDISON BROS.	− 2.9	69,365	71,454	2,155	2,029	718,761	745,771	− 3.6
TOTALS & AVERAGES	+ 4.1	7,563,460	7,264,261			67,610,160	64,624,841	+ 4.6

**000 omitted. N.C. = no change. N/A = not available.*
[1]Store number for full-line outlets only. [2]Plus 2,826 franchise stores (vs. 2,925 a year ago). [3]Includes T.G. & Y. sales. [4]Includes 265 Zayre stores (vs. 252 a year ago), 271 Hit or Miss stores (vs. 255) and 81 T. J. Maxx stores (vs. 58). [5]Excludes supermarket sales.

ETL cuts testing time on large & small appliances.

ETL s Electrical/Electronic Division, one of the largest product safety testing laboratories in the United States, provides quick turnaround for testing consumer appliances to national standards, including UL and ANSI.

ETL s labeling, listing and followup service is recognized by state, municipal and federal jurisdictions. And once we test a product, it won't be put at the end of a long waiting list should re-testing be required.

Because consumers won't wait, ETL works fast. For more information, call our Electrical/Electronic Division.

ETL TESTING LABORATORIES, INC.
Industrial Park, Cortland, NY 13045
Tel (607) 753-6711 Twx 510-252-0792

An independent, employee owned organization testing for performance, reliability, and safety.

ADVERTISERS' INDEX

A C Delco 98
Aladdin Industries 54, 55
American Greeting Corp. 6
Big Ben 89, 91, 101
Canon Camera 50
Caron International 1C2
Coats & Clark Inc. 69
Computer FX Inc. 53
Cotter & Co. V&S 51
Diamond International 62, 63*
E I DuPont Home Furnishing 2
E I DuPont Quallofil 14, 15, 80
E I DuPont Spalding Sock 88
Eastman Kodak 66
Etl Testing 100
Gem Dandy Inc. 86
Gerber Products 46
Gitano 78, 79
Jensen Car Stereo 72
Keith Clark Inc. 99
King Features 45
Lady Esther's Lingerie 82
Maxell Corp. of America 26
Miller Studio 6,17
Minolta Corporation 4
Monsanto Co. 34
Nikon 64
Nursery Originals 70
Olympus Camera Corp. 44
Pearl Corder 52
Pennsylvania Optical Co. 24
Plough Adv. Corp. 16
Rand McNally 48
Ricoh of America 74
San Mark/Star Dust Inc. 85
Shirley of Atlanta 77
Spencer's Inc. 95
Stafford Higgins Ind. 93
Talon/American 40
Teknor Apex 61
Thalheim Exposition Mgt. 67
Transworld Exhibits 99
Union Carbide 37
Velcro USA 56
Vernon McMillian 32
Vitamaster 38, 39
Winning Ways 97
Wrangler Underwear 87

**Denotes regional run*

This index has been compiled for the convenience of our advertisers and readers. While every precaution is taken to prevent mistakes the publishers cannot be held responsible for errors or omissions.